



# myETF Employer Reporting Confirmation User Guide



April 27, 2017

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## myETF Employer Online Services

myETF Employer Online Services is an internet browser-based application through which employers will report all employment, payroll, and insurance information to the Department of Employee Trust Funds (ETF) beginning in January 2018. Within myETF, employers may perform the following activities:

**Note** Not all functionality listed below is available during myETF Employer Reporting Confirmation, including secure messaging, insurance enrollment, documents, eForms, and payments.

- Add new employees (members) to their roster
- Upload Payroll File to automatically create work reports for employee payroll based on established reporting cycles (payroll calendars)
- Upload Employment File to add new employees to myETF
- Submit insurance enrollment information
- Manually create work reports for employee payroll based on established employer's reporting cycles (payroll calendars)
- Create Reporting Cycles to identify the periodic basis on which their employees are paid
- Make payments directly to ETF for balances due
- Review account transactions for payments, work reports, adjustments, etc.
- Send secure messages to ETF for their response and receive secure messages directly from ETF
- Update employer and billing location addresses, phone numbers, and establish contact information ETF can use to contact the employer by mail, email, or phone
- Manually add new employees, update existing employee information, and process insurance enrollments
- Review documents sent to the employer from ETF
- Submit electronic forms (eForms) to ETF
- Establish the users that will access myETF Employer Online Services and the roles that they hold

This guide provides the instructions for using myETF Employer Online Services to confirm files and/or manually enter payroll and employment information for myETF Employer Reporting Confirmation. Information and training on the full functionality of myETF Employer Online Services will follow in summer and fall 2017.

## Getting Started

myETF is an internet browser-based application. You can use the current and prior two versions of the most standard internet browsers (Internet Explorer/Edge, Chrome, Firefox, and Safari) to access the application from a provided URL.

**Note** The URL will be provided through a separate communication. You will use your established IAM username and password to log in to the application. If you do not have an IAM username and password, contact your ETF Employer Services representative.

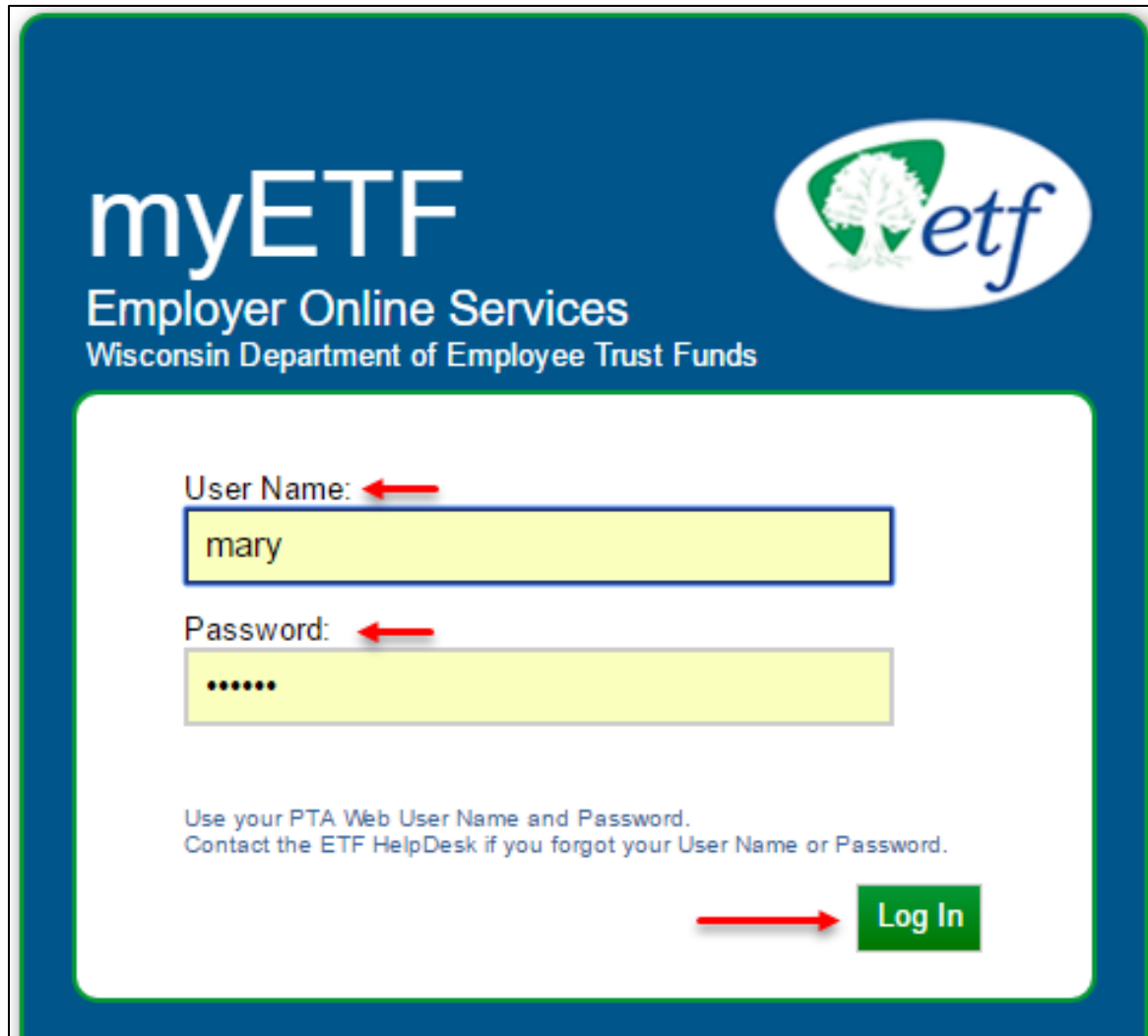
This section of the guide includes the following information:

- [Logging In and Out](#)
- [Switching Employers](#)
- [Using Grids in myETF](#)
- [Adding and Updating Addresses](#)
- [Adding and Updating Contact Information](#)

## Logging In and Out

### Logging In

- 1) Use your browser to access the provided URL.
- 2) Enter your IAM **Username** and **Password** in the appropriate fields.
- 3) Click **Log In**.



**myETF**  
Employer Online Services  
Wisconsin Department of Employee Trust Funds

**User Name:**

**Password:**

Use your PTA Web User Name and Password.  
Contact the ETF HelpDesk if you forgot your User Name or Password.

Your *Home* page displays.

**I Want To...**

- ✓ Enroll an Employee
- ✓ Upload a New Payroll File
- ✓ Make Payment
- ✓ View my Accounting Details

**Account Balances**

Fund Group Name	Due Date	Balance

**Announcements**

**Scheduled Payments**

Fund Group Name	Payment Date	Payment Amount
1 Prior Service LS	12/16/2016	\$6,000
2 WRS	10/05/2016	\$1,372
3 WRS	10/07/2016	\$3,210

**ETF Links**

- ☐ Joining Health Insurance for WRS Employers
- ☐ Joining Health Insurance for Non-WRS Employers
- ☐ Joining Life
- ☐ Joining ICI
- ☐ Joining WRS
- ☐ ETF Email Updates
- ☐ ETF Glossary
- ☐ ETF Related Links
- ☐ Local Bulletins
- ☐ Social Security Bulletins
- ☐ State Bulletins

Department of Employee Trust Funds    ETF Website    Privacy    Accessibility

**Note** If you have access to multiple employers, the *Select Employer* page displays first. Click the **Employer Name** to open the *Home* page for that employer.

**Select Employer**

Search

- ACME Carpentry (0001209)
- ACME Employer (0001-229)
- CAK Employer (CK100)
- Central Payroll (0001999)
- CKC December Test (20000012)



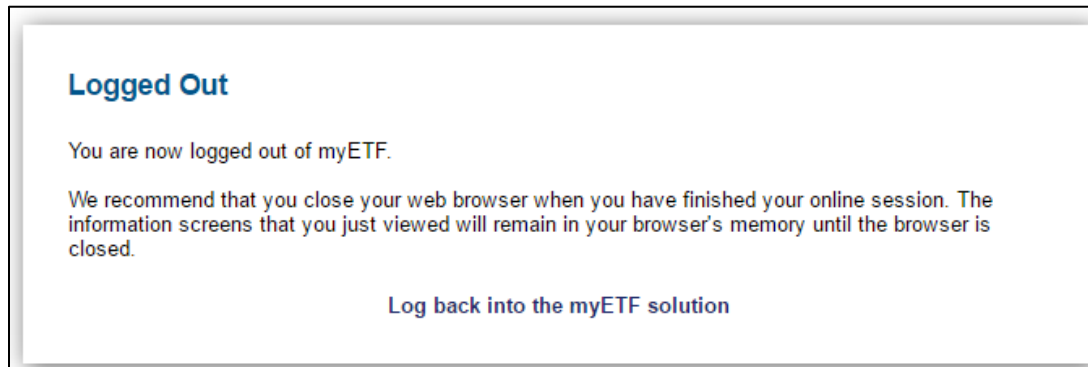
## Logging Out

It is important to log out after completing work in myETF. Logging out protects confidential data and prevents errors and data loss that can occur if you close your browser while using myETF.

- 1) Click the **Logout** link located in the upper-right corner of the window.



myETF displays a log out message.



- 2) Click the **Log back into the myETF solution** link to return to the application as needed.

**Note** After logging out, close your browser to completely log out of myETF and purge all confidential information from the browser's memory.

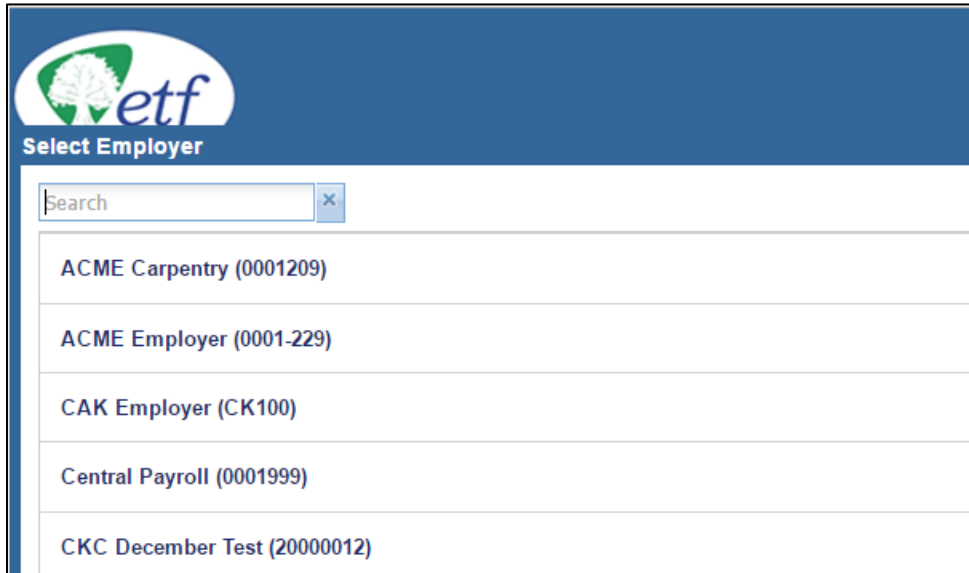
## Switching Employers

When you have access and responsibilities to perform activities for multiple employers, you can use the **Change** link located in the upper-right corner of any window to change employers.



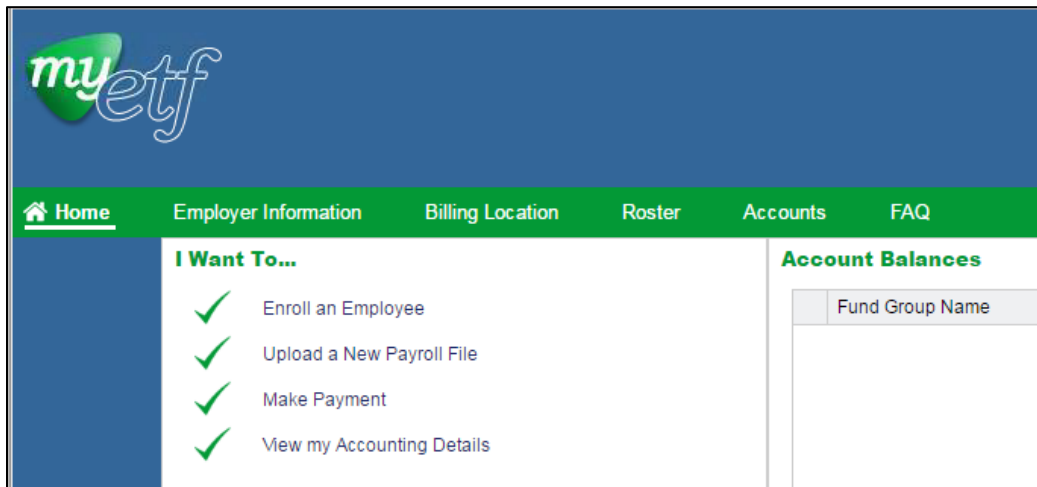
This opens the *Select Employers* screen.

- Click the name of an employer to open its *Home* page.



Search
ACME Carpentry (0001209)
ACME Employer (0001-229)
CAK Employer (CK100)
Central Payroll (0001999)
CKC December Test (20000012)

myETF opens the *Home* page for the selected employer.



myETF	
Select Employer	
Search	
ACME Carpentry (0001209)	
ACME Employer (0001-229)	
CAK Employer (CK100)	
Central Payroll (0001999)	
CKC December Test (20000012)	

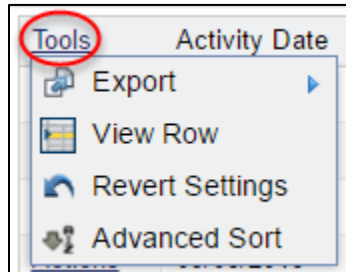
myETF		
Home   Employer Information   Billing Location   Roster   Accounts   FAQ		
<b>I Want To...</b> <ul style="list-style-type: none"><li>✓ Enroll an Employee</li><li>✓ Upload a New Payroll File</li><li>✓ Make Payment</li><li>✓ View my Accounting Details</li></ul>	<b>Account Balances</b> <table border="1"><thead><tr><th>Fund Group Name</th></tr></thead><tbody></tbody></table>	Fund Group Name
Fund Group Name		

## Using Grids in myETF

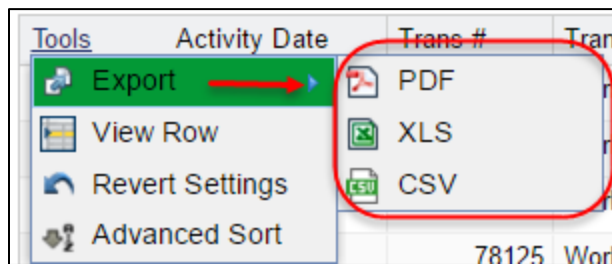
### Using the Tools Link in Grids

A grid is a table of information where the columns are the fields and the rows are the records. A grid is similar to the format of a spreadsheet.

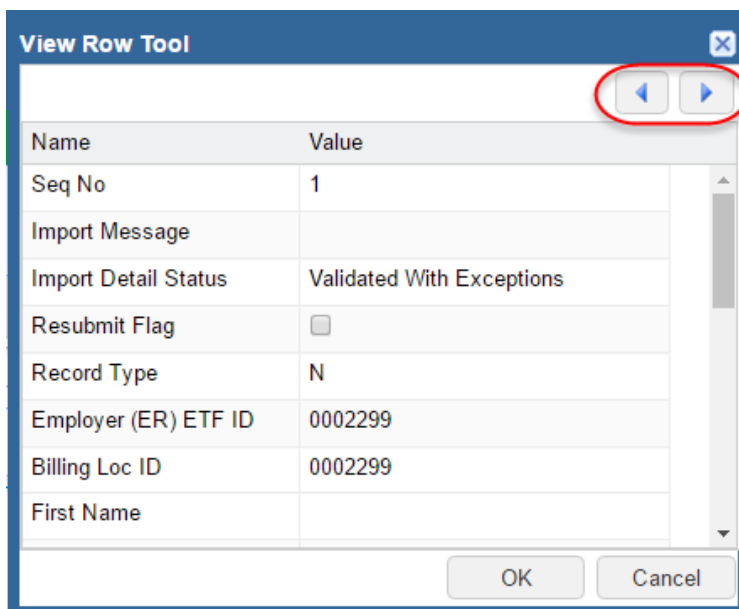
Standard Tools functions include:



**Export:** Export the data in the grid in a PDF, XLS, or CSV format. Select the format for the export and follow the prompts on the screen to select the location to save the file and to export the information.



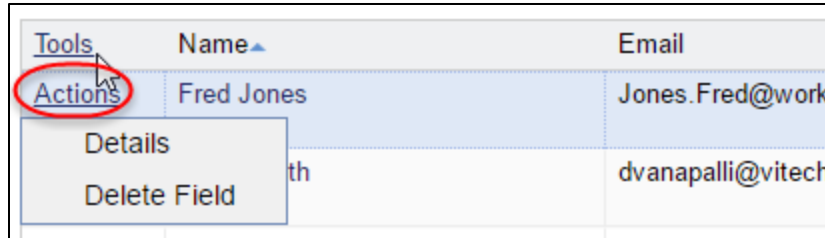
**View Row:** Displays the rows of data in the grid in vertical format. You can update information as needed in this view also. Use the arrow icons shown in the upper-right corner of pop-up to move through the records in the grid. Click the **OK** or **Cancel** buttons at the bottom of the pop-up to close it and return to seeing the records in the horizontal (grid) format.



## Using the Actions Links in Grids

Most grids contain an **Actions** link next to a record in the grid. This contains a list of functions that you can do with the selected record. The options available are specific to the grid.

Click the **Actions** link and then select an option from the list.



## Adding and Updating Addresses

myETF keeps a record of the addresses and their effective dates.

### Adding a New Address

You may need to add a new address when adding a member to your roster.

- 1) Click in the text box next to the type of address to open the *Address* pop-up.

A screenshot of a 'New Correspondence Address' pop-up window. The window has a title bar with 'New Correspondence Address' and a close button. Below the title bar are three buttons: 'OK', 'Close', and 'Copy'. The form contains the following fields: 'Country:' with a dropdown menu showing 'United States'; 'Zip Code:' with a text box; 'Address Line 1:', 'Address Line 2:', and 'Address Line 3:' each with a text box; 'City:' with a text box; 'State:' with a dropdown menu; 'County:' with a dropdown menu; and 'Effective Date:' with a text box showing '12/08/2016' and a calendar icon.

The Country defaults to United States. Change this if needed.

- 2) Enter the **Zip Code** for the address.

The **Zip Code** entered auto populates the **City**, **State**, and **County**.

- 3) Enter the **Address Line 1**  
 4) Enter the remaining **Address Lines** as needed.  
 5) Click **OK**.

The pop-up closes and the address displays in the address text box.

### Using the Actions (Pencil) Icon for an Address

The **Actions** icon (pencil) next to an address checkbox lists three options:

- **Update Address:** Select this option to open the *Update Existing...* pop-up to change the address (or click in the address text box to do the same). (See [Updating an Address.](#))
- **Remove Address:** Click this option to remove the address.
- **Map Address:** Click this option to open Google Maps showing the location of the address.

## Updating an Address

- 1) Click in the address text box to open the *Update Existing... Address* pop-up (or click the **Actions** (pencil) icon to do the same).
- 2) Make the changes directly in the pop-up.
- 3) Click **OK** to save and close the pop-up.

myETF automatically updates the **Effective Date** to the current date. You can update this field as needed to a future date.

## Adding and Updating Contact Information

myETF provides fields to enter a variety of phone and email contact information for your employees.

### Adding a Phone or Email

- **Phone:** Click in the field and type the phone number (including area code) without dashes or spaces. (e.g., 9205551212 for (920) 555-1212).

myETF automatically updates the formatting for the phone number after you tab out of the field.

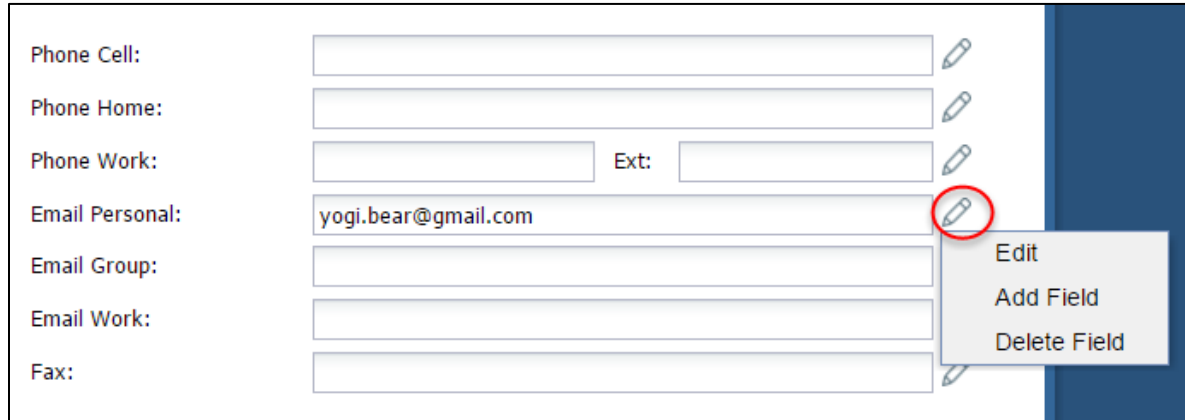
- **Email:** Click in the field and type the email address.

Phone Cell:	9205551212	Phone Cell:	(920) 555-1212
Phone Home:		Phone Home:	
Phone Work:		Phone Work:	
Email Personal:	yogi.bear@gmail.com	Email Personal:	yogi.bear@gmail.com

## Using the Actions (Pencil) Icon for Contact Information

The **Actions** (pencil) icon located next to a contact information field is used to perform the following:

- **Edit:** Click this option to change the information shown in the field (or simply click in the field and update the information shown).
- **Add Field:** Click this option to add a second field of information (e.g., Phone Cell 2).
- **Delete Field:** Use to remove the selected field of information (e.g., click this option when in the Email Group field and the Email Group field should be removed from the list).



The screenshot displays a contact information form with the following fields and their corresponding Actions (pencil) icons:

- Phone Cell: [Text Field] [Pencil Icon]
- Phone Home: [Text Field] [Pencil Icon]
- Phone Work: [Text Field] Ext: [Text Field] [Pencil Icon]
- Email Personal: yogi.bear@gmail.com [Pencil Icon]
- Email Group: [Text Field] [Pencil Icon]
- Email Work: [Text Field] [Pencil Icon]
- Fax: [Text Field] [Pencil Icon]

The Actions (pencil) icon next to the Email Personal field is circled in red. A dropdown menu is visible next to the icon, showing the following options:

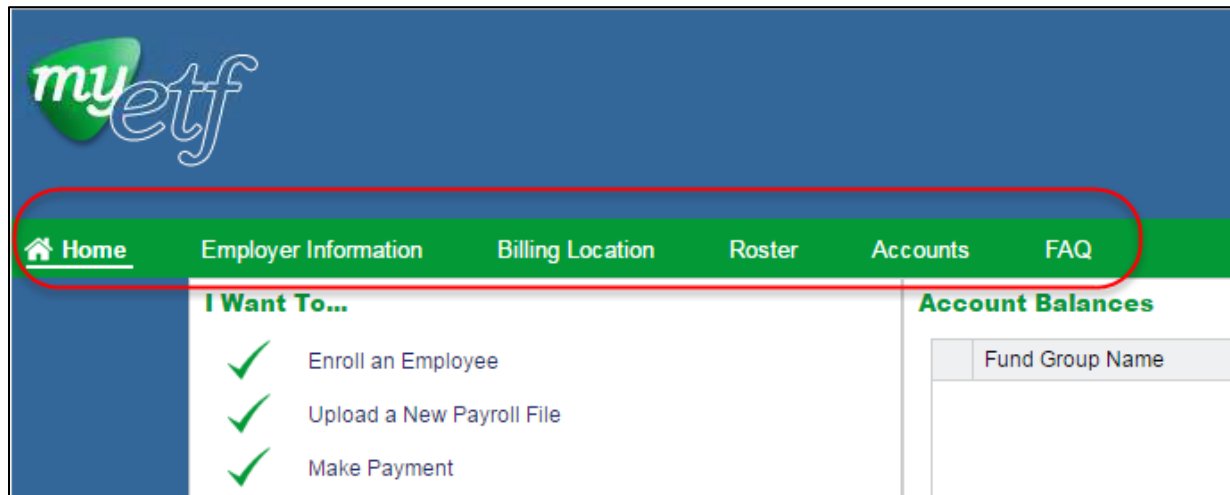
- Edit
- Add Field
- Delete Field

## Understanding the Tabs

myETF uses a tab structure to organize information and activities that you may need to access. Tabs always display on the green bar above the content area. The name of the selected tab is underlined so that you always know where you are working.

The information on each tab is specific to the selected employer. The name of the employer displays in the blue header above the green bar.

For example, in the screenshot below, the *Home* page (Dashboard) displays on the screen. You know this because “Home” on the green bar is underlined.

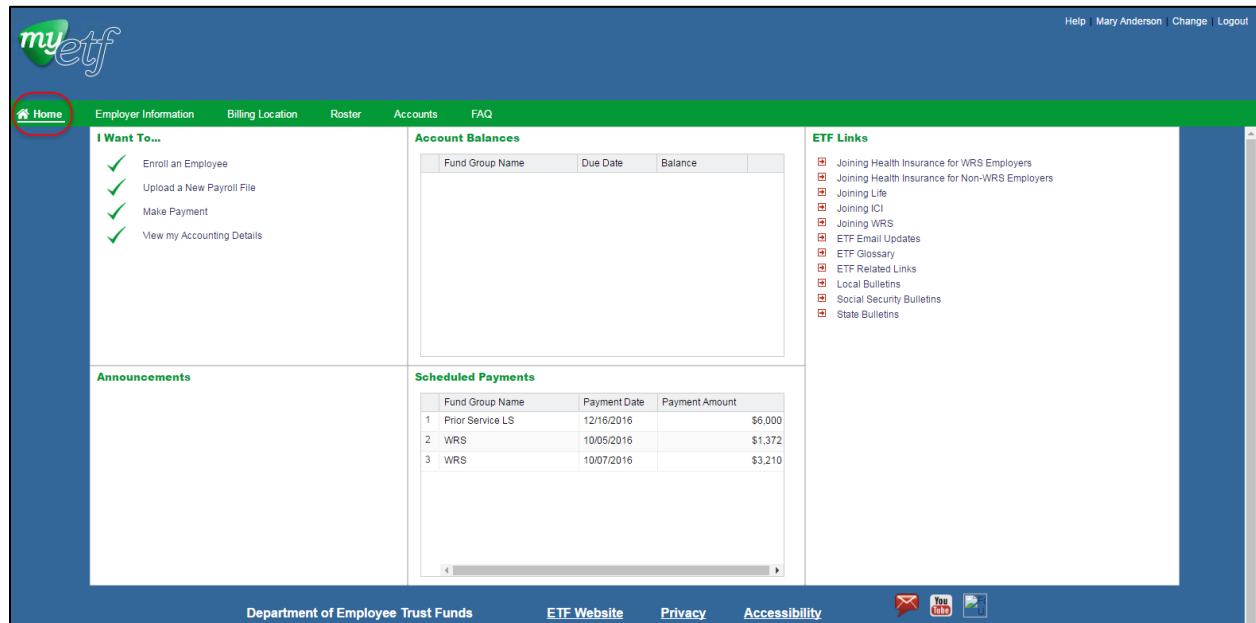


- **Home:** a summary page that provides links and important information about the employer
- **Employer Information:** provides demographic and contact information for the employer
- **Billing Location:** provides a list of billing locations associated to an employer
- **Roster:** provides a list of the employees for the employer
- **Accounts:** provides a list of transactions for the employer as well as access to upload files, file history, create a manual Work report, submit a One Time Payment, and review the Payment History
- **FAQ:** provides a list of frequently asked questions and answers. For myETF Employer Reporting Confirmation, the FAQ tab will list general information about the WRS. Please see the myETF Employer Web Pages for important Frequently Asked Questions about Confirmation.



## Using the Home Tab

The *Home* tab is the default page that opens after you log in to myETF Employer Online Services.



The Home page includes the following sections:

- **I Want To...:** shortcut links to perform the selected activity
- **Account Balances:** balances due by Fund Group Name, Due Date, and Balance Due
- **ETF Links:** shortcut links to helpful information
- **Announcements:** ETF news and information for employers
- **Scheduled Payments:** payments scheduled by Fund Group Name, Payment Date, and Payment Amount. Please note that while these fields may populate during myETF Employer Reporting Confirmation based on your reporting, these will not result in any balance due. You should continue to report employment information and payments in the Online Network for Employers (ONE) in 2017.

## Using the “I Want To...” Links

This section provides quick access (shortcut) links to perform common activities in myETF. Click a link to open the page to begin the activity.

Links available:

- **Enroll an Employee:** opens the *Add Member* wizard on the *Roster* tab that walks you through the processes for adding an employee
- **Upload a New Payroll File:** opens the *Upload Payroll File* wizard on the *Accounts* tab
- **Make Payment:** (not currently available) opens the *Make Payment* wizard on the *Accounts* tab
- **View my Accounting Details:** opens the *Accounts* tab

## Using Announcements

Review the Announcements section to see news and other important information from ETF.

## Using Account Balances

The Account Balances section displays the balances due for the employer by Fund Group Name, Due Date and the Balance.

## Using Scheduled Payments

The Scheduled Payments section displays upcoming payments by Fund Group Name, Payment Date, and Payment Amount.

## Using ETF Links

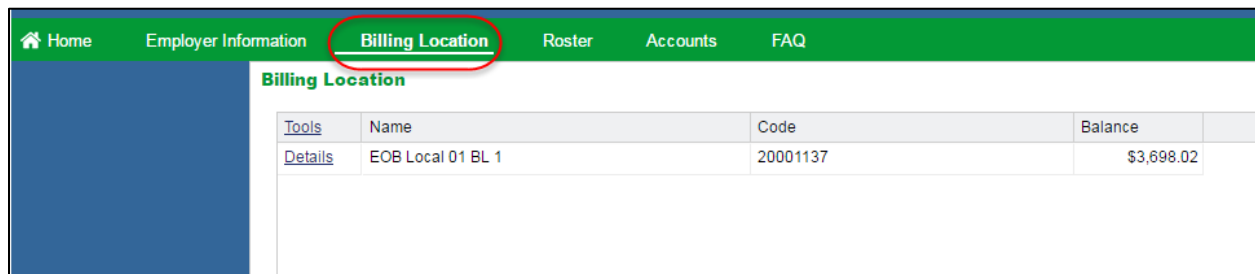
The ETF Links section of the *Home* tab displays links to ETF information that is important to employers.

Click a link to view that information.

## Using the Billing Location Tab

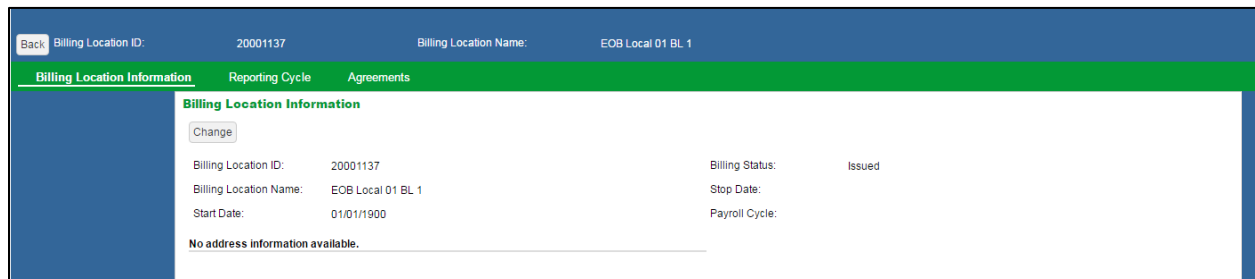
The *Billing Location* tab shows information for the employer's individual billing location(s). A billing location is a secondary level under the employer that is used for billing-related setup and processing. myETF supports one or more billing locations per employer. All billing-related employer configurations and financial transactions are associated with a billing location.

Most employers will have a single billing location. The Code is the billing location number.



Tools	Name	Code	Balance
<a href="#">Details</a>	EOB Local 01 BL 1	20001137	\$3,698.02

Click the **Details** link next to the billing location to review and update information for the selected billing location. The green bar, located under the header, changes to list tabs specific to the billing location.



Back Billing Location ID: 20001137 Billing Location Name: EOB Local 01 BL 1

Billing Location Information Reporting Cycle Agreements

**Billing Location Information**

[Change](#)

Billing Location ID: 20001137 Billing Status: Issued

Billing Location Name: EOB Local 01 BL 1 Stop Date:

Start Date: 01/01/1900 Payroll Cycle:

No address information available.

- **Billing Location Information:** provides address and contact information
- **Reporting Cycle:** add or update Reporting Cycle information for the billing location
- **Agreements:** lists the contract agreements by Fund, Job Category, Start Date, Stop Date, Rate, Due Formula

**Note** For myETF Employer Reporting Confirmation, you will need to add or update your reporting cycle(s) before you submit any files or work reports.

## Creating a Reporting Cycle

Use the billing location's *Reporting Cycle* tab to set up the frequency by which you pay your employees and submit work reports for each billing location. A reporting cycle is the same as the Report Generation Type discussed in the myETF Payroll File Resource document.

Each billing location must have at least one reporting cycle to process work reports in myETF (e.g. bi-weekly, monthly, etc.). The reporting cycle is used to derive the start and stop date associated with the reported period. Most ETF employers have only one reporting cycle. Some larger employers have multiple overlapping reporting cycles for different types of employees.

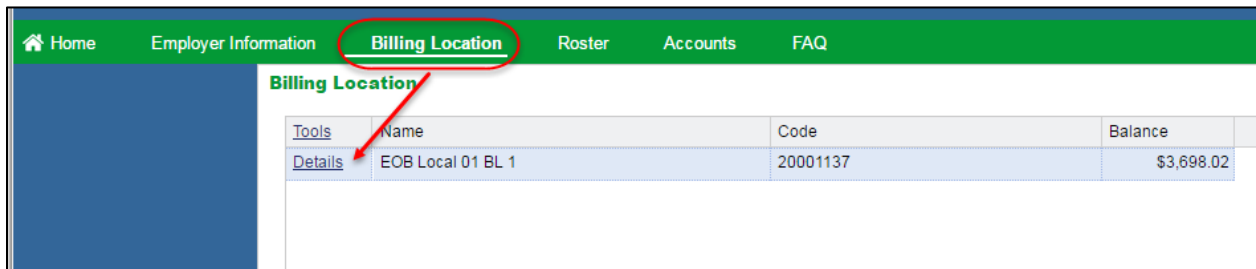
Reporting cycle dates can only overlap as long as they have different frequencies and frequency descriptors (e.g., C-Bi-Weekly Mon W1 vs C-Bi-Weekly Tue W1). An employer cannot have two reporting cycles that are exactly the same across both frequency and descriptor (e.g., 2 cycles for C-Bi-Weekly Mon W1)

**Note** You need to create or update your reporting cycle(s) when you begin the confirmation process. This cycle should match the payroll cycle(s) of the information you plan to confirm.

You may need to create a new reporting cycle if one is not showing for the payroll cycle(s) you plan to report.

You may need to update an existing reporting cycle when the dates are not correct on the existing reporting cycles for your billing location and do not match the date of the files you will upload or work reports you will manually create.

- 1) Log in to myETF Employer Online Services as shown in [Logging In](#).
- 2) Select the *Billing Location* tab.
- 3) Click the **Details** link for the appropriate Billing Location.



Billing Location			
Tools	Name	Code	Balance
<a href="#">Details</a>	EOB Local 01 BL 1	20001137	\$3,698.02

myETF displays additional information specific to the selected billing location.

- 4) Click the *Reporting Cycle* tab.
- 5) Click **Add** to open the *Reporting Cycle* pop-up.

Tools	Description	Start Date	Frequency	Cycle Start Date
<a href="#">Actions</a>	C - Bi-Weekly Sun-W1	12/25/2016	Bi-Weekly	12/25/2016
<a href="#">Actions</a>	C - Weekly	01/01/2017	Weekly	01/01/2017
<a href="#">Actions</a>	C - Monthly	01/01/2017	Monthly	01/01/2017
<a href="#">Actions</a>	C - Bi-Weekly	01/01/2017	Bi-Weekly	01/01/2017

A blank *Reporting Cycle* pop-up displays.

- 6) Enter the following required information in the *Reporting Cycle* pop-up.
  - ➔ **Report Type:** work report generation type applicable to the reporting cycle; (see [Reporting Cycle Definitions](#))
  - ➔ **Start Date:** date on which the first reporting cycle starts
  - ➔ **Frequency:** drives the expected period (start/stop dates) of work reports submitted or generated for the reporting cycle (e.g., bi-weekly, monthly, weekly, semi-monthly, etc.). Select the option that matches the Report Type you selected (C-Monthly = Monthly Frequency)
  - ➔ **Cycle Start Date:** date on which the first report cycle starts (same as the **Start Date**)

**Note** Do not enter a **Stop Date** when creating or updating a Reporting Cycle.

- 7) Click **Save** to retain the changes or **Cancel** to end the process.
- 8) Review the information. (If needed, use the **Back** button to change any incorrect details.)
- 9) Click **Confirm** when the information is correct.

The pop-up closes and the reporting cycle is listed in the Reporting Cycle Information grid.

**Note** After a reporting cycle is created, it may only be updated prior to submitting a work report associated to the cycle. If the report cycle is incorrect and a report has been submitted, update the report cycle to enter a **Stop Date** and then create a new cycle with the appropriate dates. See [Updating a Reporting Cycle](#).

Reporting Cycle

Change

Reporting Cycle

Report Type: C - Monthly

Start Date: 01/09/2016

Frequency: Monthly

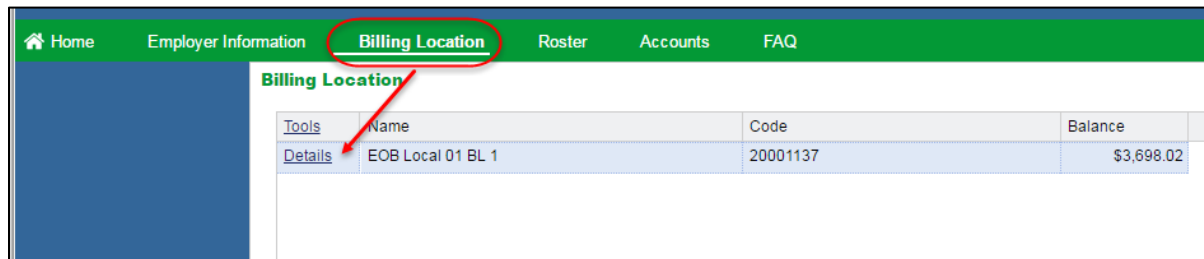
Stop Date: MM/dd/yyyy

Cycle Start Date: 01/09/2016

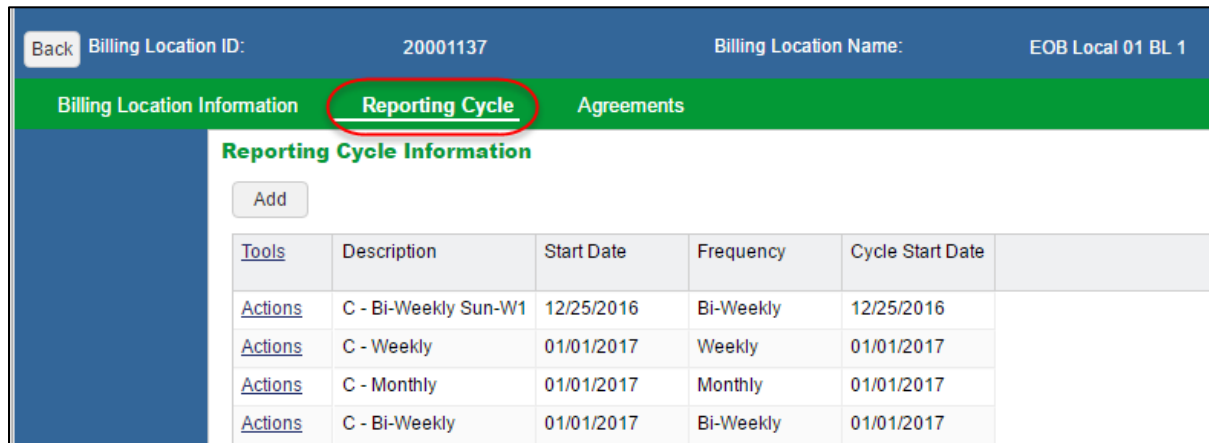
## Updating a Reporting Cycle

If a reporting cycle was entered incorrectly, it may only be changed prior to submitting the first payroll report associated with the reporting cycle.

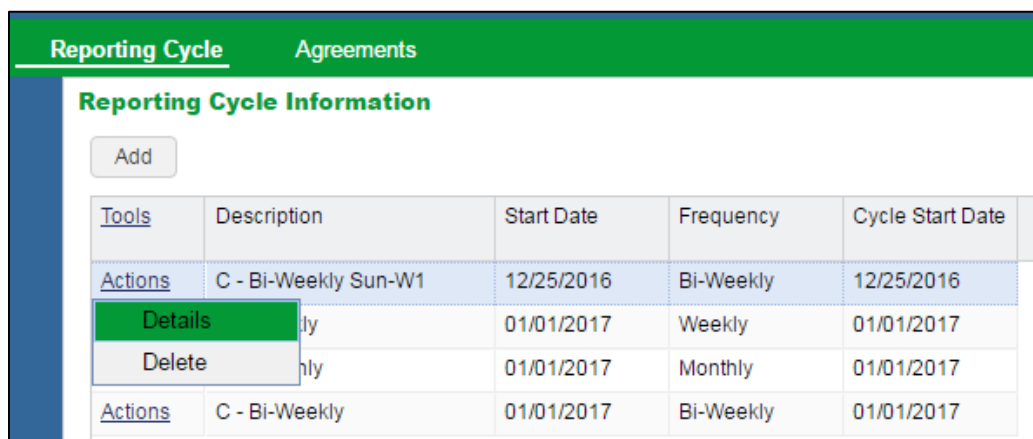
- 1) Log in to myETF Employer Online Services as shown in [Logging In](#).
- 2) Select the *Billing Location* tab.
- 3) Click the **Details** link for the appropriate billing location.



- 4) Click the *Reporting Cycle* tab.

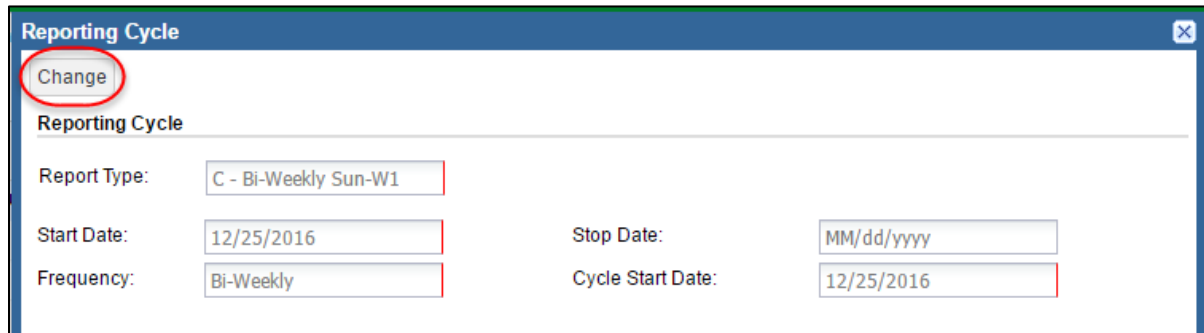


- 5) Click the **Actions** link next to the reporting cycle that needs to be changed.
- 6) Select **Details** from the options list to open the *Reporting Cycle* pop-up.



The Reporting Cycle's details display on the screen.

- 7) Click **Change** to put the pop-up in edit mode.



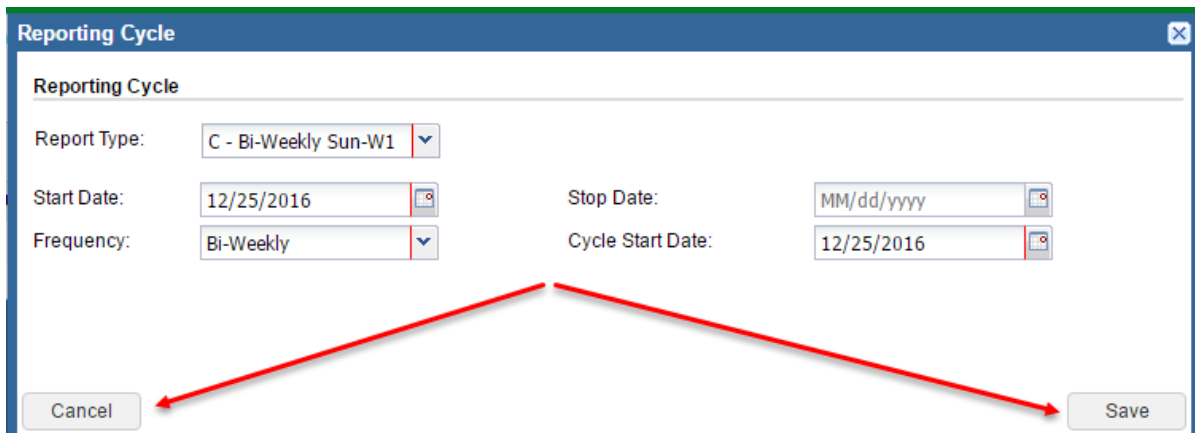
The 'Reporting Cycle' dialog box is shown in edit mode. The 'Change' button in the top-left corner is circled in red. The dialog contains the following fields:

Reporting Cycle			
Report Type:	C - Bi-Weekly Sun-W1		
Start Date:	12/25/2016	Stop Date:	MM/dd/yyyy
Frequency:	Bi-Weekly	Cycle Start Date:	12/25/2016

- 8) Update the information as needed.

**Note** The **Start Date** should be the 1<sup>st</sup> day of the payroll period in which you will upload a Payroll File, Employment File or generate a manual work report.

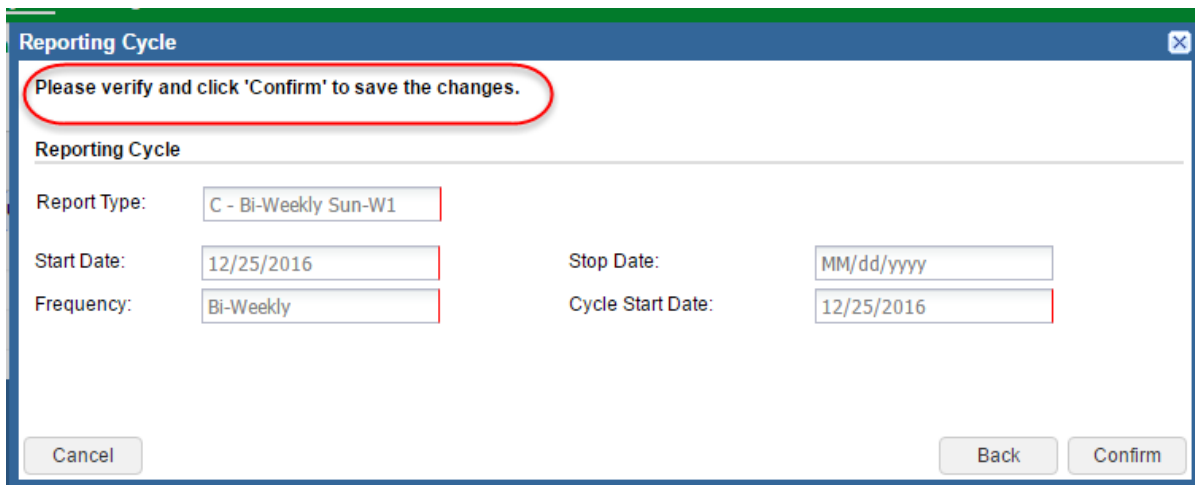
- 9) Click **Save** to retain the changes (or **Cancel** to discontinue the changes).



The 'Reporting Cycle' dialog box is shown with the 'Save' and 'Cancel' buttons at the bottom highlighted by red arrows. The fields are as follows:

Reporting Cycle			
Report Type:	C - Bi-Weekly Sun-W1		
Start Date:	12/25/2016	Stop Date:	MM/dd/yyyy
Frequency:	Bi-Weekly	Cycle Start Date:	12/25/2016

A message displays at the top of the window.



The 'Reporting Cycle' dialog box is shown with a confirmation message at the top: 'Please verify and click 'Confirm' to save the changes.' The message is circled in red. The fields are as follows:

Reporting Cycle			
Report Type:	C - Bi-Weekly Sun-W1		
Start Date:	12/25/2016	Stop Date:	MM/dd/yyyy
Frequency:	Bi-Weekly	Cycle Start Date:	12/25/2016

Buttons at the bottom: Cancel, Back, Confirm.



- 10) Click **Confirm** after reviewing that the information is correct (or **Back** to correct the information).

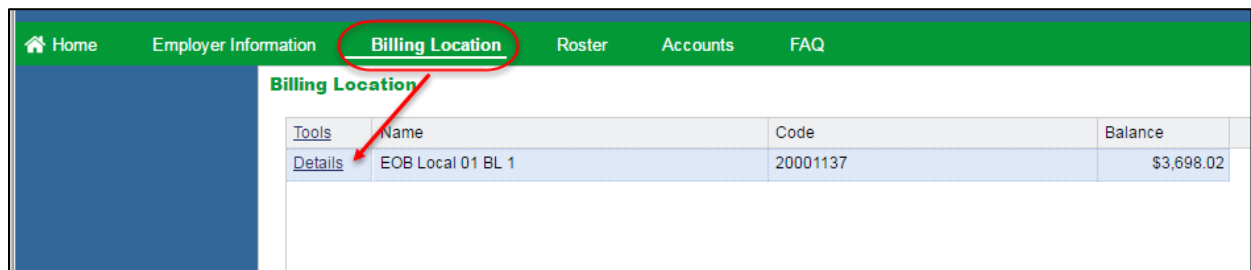
The pop-up closes and the changes are reflected in the Reporting Cycle Information grid.

## Deleting a Reporting Cycle

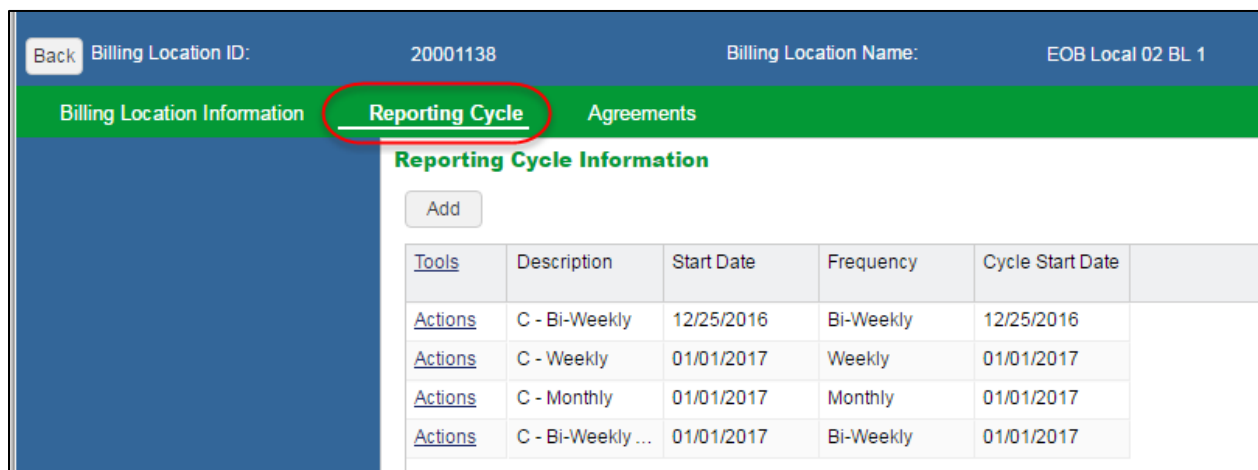
If a reporting cycle is created in error, it may be deleted prior to its use.

**Note** If employers have already submitted work reports for the reporting cycle, enter a stop date for the reporting cycle (see [Updating a Reporting Cycle](#)) and create a new reporting cycle (see [Creating a Reporting Cycle](#)).

- 1) Log in to myETF Employer Online Services as shown in [Logging In](#).
- 2) Select the *Billing Location* tab.
- 3) Click the **Details** link for the appropriate billing location.



- 4) Click the *Reporting Cycle* tab.



- 5) Click the **Actions** link next to the reporting cycle that needs to be deleted.
- 6) Select **Delete** from the options list.

The screenshot shows the 'Reporting Cycle Information' section of a web application. At the top, there's a header with '20001137' and 'Billing Location Name: EOB Local 01 BL 1'. Below this is a green bar with 'Reporting Cycle' and 'Agreements'. The main area is titled 'Reporting Cycle Information' and contains an 'Add' button. Below the button is a table with columns: Tools, Description, Start Date, Frequency, and Cycle Start Date. The table has three rows. The first row is highlighted in blue. The 'Tools' column for the first row has a dropdown menu open, showing 'Details' and 'Delete' (highlighted in green with a red arrow pointing to it). The second row is also highlighted in blue. The third row is not highlighted.

Tools	Description	Start Date	Frequency	Cycle Start Date
Actions	C - Bi-Weekly Sun-W1	12/25/2016	Bi-Weekly	12/25/2016
Details	ly	01/01/2017	Weekly	01/01/2017
Delete	ly	01/01/2017	Monthly	01/01/2017
Actions	C - Bi-Weekly	01/01/2017	Bi-Weekly	01/01/2017

- 7) Select **OK** in the *Confirmation Message* pop-up to confirm you want to delete the reporting cycle.

The Reporting Cycle is removed from the Reporting Cycle information grid.

**Note** If you accidentally delete a reporting cycle, you must re-create it. See [Creating a Reporting Cycle](#).

## Reporting Cycle Definitions

The following table provides a list of the available reporting cycles and descriptions of each. The **Report Type** name in the drop-down list is prefaced by a "C." This indicates "contributions." The **Code** is how this Report Type name shows in the Payroll File record. This list is described as "Report Generation Types" in the myETF Payroll and Employment File Resources.

The screenshot shows the 'Reporting Cycle' form. It has a 'Change' button at the top left. Below it is a section titled 'Reporting Cycle' with a horizontal line. Under the line are five fields: 'Report Type' (with a dropdown menu showing 'C - Monthly'), 'Start Date' (with a date picker showing '01/09/2016'), 'Stop Date' (with a date picker showing 'MM/dd/yyyy'), 'Frequency' (with a dropdown menu showing 'Monthly'), and 'Cycle Start Date' (with a date picker showing '01/09/2016').

Code	Report Type	Description
W00	Weekly	A standard weekly cycle that can begin on any day of the week. Only to be used if the employer doesn't have multiple overlapping weekly cycles.
M00	Monthly	A standard monthly cycle that can begin on any day of the month. Only to be used if the employer doesn't have multiple overlapping monthly cycles.
B00	Bi-Weekly	A standard bi-weekly cycle that can begin on any day of the month. Only to be used if the employer doesn't have multiple overlapping bi-weekly cycles.
S00	Semi-Monthly	A standard semi-monthly cycle
W01	Weekly Mon	A weekly cycle that begins on a Monday. To be used if the employer has multiple overlapping weekly cycles.
W02	Weekly Tue	A weekly cycle that begins on a Tuesday. To be used if the employer has multiple overlapping weekly cycles.
W03	Weekly Wed	A weekly cycle that begins on a Wednesday. To be used if the employer has multiple overlapping weekly cycles.
W04	Weekly Thu	A weekly cycle that begins on a Thursday. To be used if the employer has multiple overlapping weekly cycles.
W05	Weekly Fri	A weekly cycle that begins on a Friday. To be used if the employer has multiple overlapping weekly cycles.
W06	Weekly Sat	A weekly cycle that begins on a Saturday. To be used if the employer has multiple overlapping weekly cycles.
W07	Weekly Sun	A weekly cycle that begins on a Sunday. To be used if the employer has multiple overlapping weekly cycles.
B01	Bi-Weekly Mon-W1	A bi-weekly cycle that begins on a Monday of week 1. To be used if the employer has multiple overlapping bi-weekly cycles.
B02	Bi-Weekly Tue-W1	A bi-weekly cycle that begins on a Tuesday of week 1. To be used if the employer has multiple overlapping bi-weekly cycles.
B03	Bi-Weekly Wed-W1	A bi-weekly cycle that begins on a Wednesday of week 1. To be used if the employer has multiple overlapping bi-weekly cycles.
B04	Bi-Weekly Thu-W1	A bi-weekly cycle that begins on a Thursday of week 1. To be used if the employer has multiple overlapping bi-weekly cycles.
B05	Bi-Weekly Fri-W1	A bi-weekly cycle that begins on a Friday of week 1. To be used if the employer has multiple overlapping bi-weekly cycles.

Code	Report Type	Description
B06	Bi-Weekly Sat-W1	A bi-weekly cycle that begins on a Saturday of week 1. To be used if the employer has multiple overlapping bi-weekly cycles.
B07	Bi-Weekly Sun-W1	A bi-weekly cycle that begins on a Sunday of week 1. To be used if the employer has multiple overlapping bi-weekly cycles.
B08	Bi-Weekly Mon-W2	A bi-weekly cycle that begins on a Monday of week 2. To be used if the employer has multiple overlapping bi-weekly cycles.
B09	Bi-Weekly Tue-W2	A bi-weekly cycle that begins on a Tuesday of week 2. To be used if the employer has multiple overlapping bi-weekly cycles.
B10	Bi-Weekly Wed-W2	A bi-weekly cycle that begins on a Wednesday of week 2. To be used if the employer has multiple overlapping bi-weekly cycles.
B11	Bi-Weekly Thu-W2	A bi-weekly cycle that begins on a Thursday of week 2. To be used if the employer has multiple overlapping bi-weekly cycles.
B12	Bi-Weekly Fri-W2	A bi-weekly cycle that begins on a Friday of week 2. To be used if the employer has multiple overlapping bi-weekly cycles.
B13	Bi-Weekly Sat-W2	A bi-weekly cycle that begins on a Saturday of week 2. To be used if the employer has multiple overlapping bi-weekly cycles.
B14	Bi-Weekly Sun-W2	A bi-weekly cycle that begins on a Sunday of week 2. To be used if the employer has multiple overlapping bi-weekly cycles.
M01	Monthly 1 <sup>st</sup>	A monthly cycle that begins on the 1 <sup>st</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M02	Monthly 2 <sup>nd</sup>	A monthly cycle that begins on the 2 <sup>nd</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M03	Monthly 3 <sup>rd</sup>	A monthly cycle that begins on the 3 <sup>rd</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M04	Monthly 4 <sup>th</sup>	A monthly cycle that begins on the 4 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M05	Monthly 5 <sup>th</sup>	A monthly cycle that begins on the 5 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M06	Monthly 6 <sup>th</sup>	A monthly cycle that begins on the 6 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M07	Monthly 7 <sup>th</sup>	A monthly cycle that begins on the 7 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.

Code	Report Type	Description
M08	Monthly 8 <sup>th</sup>	A monthly cycle that begins on the 8 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M09	Monthly 9 <sup>th</sup>	A monthly cycle that begins on the 9 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M10	Monthly 10 <sup>th</sup>	A monthly cycle that begins on the 10 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M11	Monthly 11 <sup>th</sup>	A monthly cycle that begins on the 11 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M12	Monthly 12 <sup>th</sup>	A monthly cycle that begins on the 12 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M13	Monthly 13 <sup>th</sup>	A monthly cycle that begins on the 13 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M14	Monthly 14 <sup>th</sup>	A monthly cycle that begins on the 14 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M15	Monthly 15 <sup>th</sup>	A monthly cycle that begins on the 15 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M16	Monthly 16 <sup>th</sup>	A monthly cycle that begins on the 16 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M17	Monthly 17 <sup>th</sup>	A monthly cycle that begins on the 17 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M18	Monthly 18 <sup>th</sup>	A monthly cycle that begins on the 18 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M19	Monthly 19 <sup>th</sup>	A monthly cycle that begins on the 19 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M20	Monthly 20 <sup>th</sup>	A monthly cycle that begins on the 20 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M21	Monthly 21 <sup>st</sup>	A monthly cycle that begins on the 21 <sup>st</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M22	Monthly 22 <sup>th</sup>	A monthly cycle that begins on the 22 <sup>nd</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M23	Monthly 23 <sup>rd</sup>	A monthly cycle that begins on the 23 <sup>rd</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.

Code	Report Type	Description
M24	Monthly 24 <sup>h</sup>	A monthly cycle that begins on the 24 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M25	Monthly 25 <sup>th</sup>	A monthly cycle that begins on the 25 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M26	Monthly 26 <sup>th</sup>	A monthly cycle that begins on the 26 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M27	Monthly 27 <sup>th</sup>	A monthly cycle that begins on the 27 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M28	Monthly 28 <sup>th</sup>	A monthly cycle that begins on the 28 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M29	Monthly 29 <sup>th</sup>	A monthly cycle that begins on the 29 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M30	Monthly 30 <sup>th</sup>	A monthly cycle that begins on the 30 <sup>th</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
M31	Monthly 31 <sup>st</sup>	A monthly cycle that begins on the 31 <sup>st</sup> of the month. To be used if the employer has multiple overlapping monthly cycles.
S01	Semi-annual	A semi-annual cycle only used for conversion and reporting of pre-myETF adjustments.
A00	Annual	An annual cycle only used for conversion and reporting of pre-myETF adjustments.
S02	Semi-Monthly 1 <sup>st</sup>	A semi-monthly cycle that begins on the 1 <sup>st</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S03	Semi-Monthly 2 <sup>nd</sup>	A semi-monthly cycle that begins on the 2 <sup>nd</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S04	Semi-Monthly 3 <sup>rd</sup>	A semi-monthly cycle that begins on the 3 <sup>rd</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S05	Semi-Monthly 4 <sup>th</sup>	A semi-monthly cycle that begins on the 4 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S06	Semi-Monthly 5 <sup>th</sup>	A semi-monthly cycle that begins on the 5 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S07	Semi-Monthly 6 <sup>th</sup>	A semi-monthly cycle that begins on the 6 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.

Code	Report Type	Description
S08	Semi-Monthly 7 <sup>th</sup>	A semi-monthly cycle that begins on the 7 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S09	Semi-Monthly 8 <sup>th</sup>	A semi-monthly cycle that begins on the 8 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S10	Semi-Monthly 9 <sup>th</sup>	A semi-monthly cycle that begins on the 9 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S11	Semi-Monthly 10 <sup>th</sup>	A semi-monthly cycle that begins on the 10 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S12	Semi-Monthly 11 <sup>th</sup>	A semi-monthly cycle that begins on the 11 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S13	Semi-Monthly 12 <sup>th</sup>	A semi-monthly cycle that begins on the 12 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S14	Semi-Monthly 13 <sup>th</sup>	A semi-monthly cycle that begins on the 13 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S15	Semi-Monthly 14 <sup>th</sup>	A semi-monthly cycle that begins on the 14 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S16	Semi-Monthly 15 <sup>th</sup>	A semi-monthly cycle that begins on the 15 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S17	Semi-Monthly 16 <sup>th</sup>	A semi-monthly cycle that begins on the 16 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S18	Semi-Monthly 17 <sup>th</sup>	A semi-monthly cycle that begins on the 17 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S19	Semi-Monthly 18 <sup>th</sup>	A semi-monthly cycle that begins on the 18 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S20	Semi-Monthly 19 <sup>th</sup>	A semi-monthly cycle that begins on the 19 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S21	Semi-Monthly 20 <sup>th</sup>	A semi-monthly cycle that begins on the 20 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S22	Semi-Monthly 21 <sup>st</sup>	A semi-monthly cycle that begins on the 21 <sup>st</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S23	Semi-Monthly 22 <sup>nd</sup>	A semi-monthly cycle that begins on the 22 <sup>nd</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.

Code	Report Type	Description
S24	Semi-Monthly 23 <sup>rd</sup>	A semi-monthly cycle that begins on the 23 <sup>rd</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S25	Semi-Monthly 24 <sup>th</sup>	A semi-monthly cycle that begins on the 24 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S26	Semi-Monthly 25 <sup>th</sup>	A semi-monthly cycle that begins on the 25 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S27	Semi-Monthly 26 <sup>th</sup>	A semi-monthly cycle that begins on the 26 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S28	Semi-Monthly 27 <sup>th</sup>	A semi-monthly cycle that begins on the 27 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S29	Semi-Monthly 28 <sup>th</sup>	A semi-monthly cycle that begins on the 28 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S30	Semi-Monthly 29 <sup>th</sup>	A semi-monthly cycle that begins on the 29 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S31	Semi-Monthly 30 <sup>th</sup>	A semi-monthly cycle that begins on the 30 <sup>th</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.
S32	Semi-Monthly 31 <sup>st</sup>	A semi-monthly cycle that begins on the 31 <sup>st</sup> of the month. To be used if the employer has multiple overlapping semi-monthly cycles.



## Using the Roster Tab

The *Roster* tab contains the list of employees at a billing location. This tab is used to create new employees and to update existing employee records. By default, the grid displays only the active contracts. Remove the checkmark from the checkbox next to this option to display terminated employees.

Tools	SSN	Name	Begin Date	End Date	Agreement	Status	Job Category	Report Generation Type
<a href="#">Actions</a>	XXX-XX-2004	Flintson101, Fredrick	01/02/2017		EOB Local 01 BL 1	WRS Eligible	General Employment	Weekly
<a href="#">Actions</a>	XXX-XX-8556	Gann, Macheille	01/01/2017		EOB Local 01 BL 1	WRS Eligible	General Employment	Bi-Weekly
<a href="#">Actions</a>	XXX-XX-2003	Ghost101, Space	01/02/2017		EOB Local 01 BL 1	WRS Eligible	General Employment	Weekly
<a href="#">Actions</a>	XXX-XX-2006	Herculoid, Zandor	01/08/2017		EOB Local 01 BL 1	WRS Eligible	Teacher	Weekly
<a href="#">Actions</a>	XXX-XX-2005	Hound101, Huckleberry	01/02/2017		EOB Local 01 BL 1	WRS Eligible	General Employment	Weekly
<a href="#">Actions</a>	XXX-XX-2001	Jetson101, George	01/02/2017		EOB Local 01 BL 1	WRS Eligible	General Employment	Weekly
<a href="#">Actions</a>	XXX-XX-2002	Rubble101, Betty	01/02/2017		EOB Local 01 BL 1	WRS Eligible	Teacher	Weekly

- Use the **Billing Location Name** drop-down list to select the appropriate billing location and view the list of employees for that location in the grid.

You can use the **Tools** link in the grid header to export the employee roster list in a PDF, XLS, or CSV format.

- Click the **Add New Hire** button to create a new employee record for a person not listed on the roster as needed.
- Click the **Actions** link next to an employee name to view and update their employment record.

This section includes instructions to perform the following:

- [Searching for an Employee Record](#)
- [Exporting the Employee Roster](#)
- [Viewing and Updating an Employee Record](#)
  - ➔ [Adding Member Contract Information](#)
  - ➔ [Viewing and Updating Member Contract](#) Details
  - ➔ [Viewing and Updating Employment Information](#)
- [Adding a New Hire](#)
- [Viewing a Member's Work History](#)

## Searching for an Employee Record

Each employee at a billing location for an employer displays in the Roster grid. An employee may be listed more than once in the grid when they are employed in multiple job categories or have multiple contracts with the employer.

- 1) Log in to myETF Employer Online Services as shown in [Logging In](#).
- 2) Click the *Roster* tab.

The Billing Location Name displays a default billing location for the employer. The majority of employers have only one billing location.

- 3) Select the **billing location** from the drop-down list to display the employees for that location if needed.

The screenshot shows the 'Roster' tab selected in the top navigation bar. Below the navigation bar, the 'Billing Location Name' dropdown menu is open, showing a list of locations. The 'Search' text box is empty. The 'Active Contract' checkbox is checked. The Roster grid displays a list of employees with columns: Tools, SSN, Name, Begin Date, End Date, Status, Job Category, and Report Generation Type.

Tools	SSN	Name	Begin Date	End Date	Status	Job Category	Report Generation Type
<a href="#">Actions</a>	XXX-XX-2004	Flintson101, Fredrick	01/02/2017		WRS Eligible	General Employment	Weekly
<a href="#">Actions</a>	XXX-XX-8556	Gann, Machelie	01/01/2017		WRS Eligible	General Employment	Bi-Weekly
<a href="#">Actions</a>	XXX-XX-2003	Ghost101, Space	01/02/2017		WRS Eligible	General Employment	Weekly
<a href="#">Actions</a>	XXX-XX-2006	Herculoid, Zandor	01/08/2017		WRS Eligible	Teacher	Weekly
<a href="#">Actions</a>	XXX-XX-2005	Hound101, Huckleberry	01/02/2017		WRS Eligible	General Employment	Weekly
<a href="#">Actions</a>	XXX-XX-2001	Jetson101, George	01/02/2017		WRS Eligible	General Employment	Weekly
<a href="#">Actions</a>	XXX-XX-2002	Rubble101, Betty	01/02/2017		WRS Eligible	Teacher	Weekly

- 4) Optionally, search for a specific employee name by entering their last name, first name in the **Search** text box located under the **Billing Location Name**.

As you type, the list of names filters automatically.

The screenshot shows the 'Roster' tab selected. The 'Billing Location Name' dropdown menu is open. The 'Search' text box contains the text 'spac'. The 'Active Contract' checkbox is checked. The Roster grid displays a list of employees with columns: Tools, SSN, Name, Begin Date, End Date, Status, Job Category, and Report Generation Type.

Tools	SSN	Name	Begin Date	End Date	Status	Job Category	Report Generation Type
<a href="#">Actions</a>	XXX-XX-2003	Ghost101, Space	01/02/2017		WRS Eligible	General Employment	Weekly

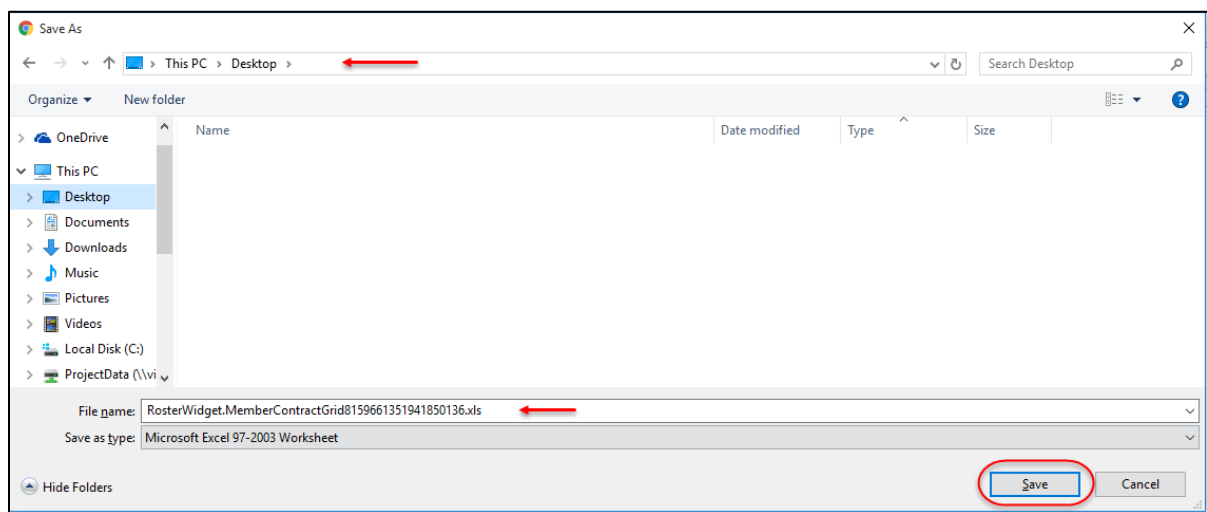
To remove the filter, click the X next to the **Search** box.

- 5) Optionally, deselect the **Active Contract** checkbox to include employees in the list who no longer have an active member contract.

The employees for the selected billing location (as filtered) display in the Roster grid.

## Exporting the Employee Roster

- 1) Log in to myETF Employer Online Services as shown in [Logging In](#).
- 2) Click the *Roster* tab.
- 3) Select the billing location from the drop-down list to display the employees for that location.
- 4) Click the **Tools** link in the grid header.
- 5) Select **Export** and then the format of the exported list (PDF, XLS, or CSV).
- 6) Locate the appropriate location on your computer or network in the Save As pop-up.
- 7) Update the **File Name** as needed.
- 8) Click **Save**.



The file saves with the name you entered to the location selected.

- 9) Navigate to the location where you saved the file to open the exported file.

## Viewing and Updating an Employee Record

- 1) Search for an employee on the *Roster* tab. (See [Searching for an Employee Record](#).)
- 2) Click the **Actions** link next to the employee name to perform one of the following:
  - ➔ **Add Member Contract:** create a new member contract for an employee who is hired in a second job category at the same billing location. A member contract is the employment information about the employee's employment at your billing location. Employees may have multiple member contracts at your billing location if they are hired to work in multiple job categories or are paid on different reporting cycles simultaneously. (See [Adding Member Contract Information](#).)
  - ➔ **View Details:** review and update the member contract information for an employee's job category and employment details. (See [Viewing and Updating Member Contract Details](#).)
  - ➔ **Insurance Enrollment:** enroll an employee in an insurance program. Not available for myETF Employer Reporting Confirmation.
  - ➔ **View Employee Info:** review and update the employee's record, including contact information, relationships, work history, and insurance enrollment. (See [Viewing and Updating Employment Information](#).)

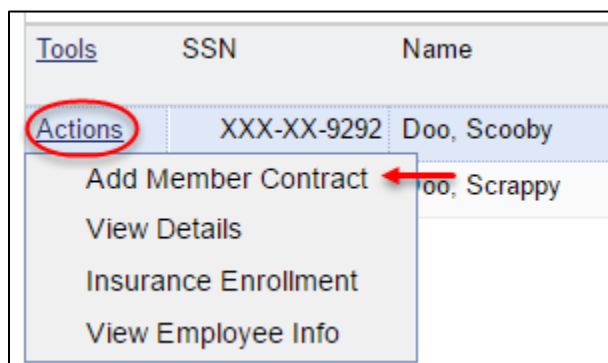
### Adding Member Contract Information

Use the **Add Member Contract** option when an existing employee for an employer's billing location is hired to perform another job category within the same billing location simultaneously.

**Note** To update the information for an existing employee's job category, select the **View Details** option (see [Viewing and Updating Member Contract Details](#)).

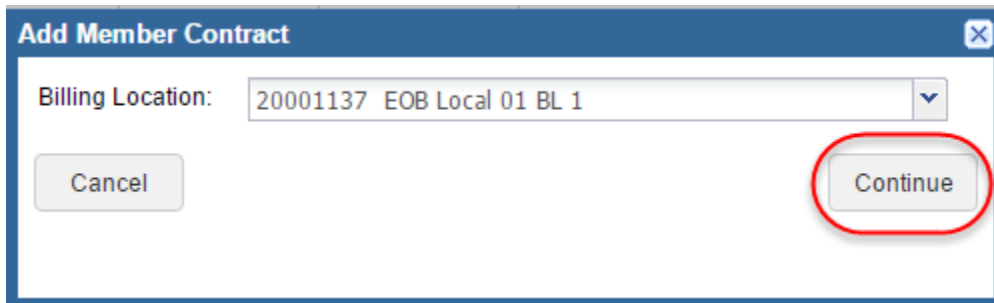
On the *Roster* tab for the employer's billing location:

- 1) Click the **Actions** link next to the employee's name.
- 2) Select **Add Member Contract**.



The *Add Member Contract* pop-up displays the Billing Location for the employee.

- 3) Update the **Billing Location** name to the specific billing location from the drop-down list if adding a member contract to an employee for a different billing location.
- 4) Click **Continue**.



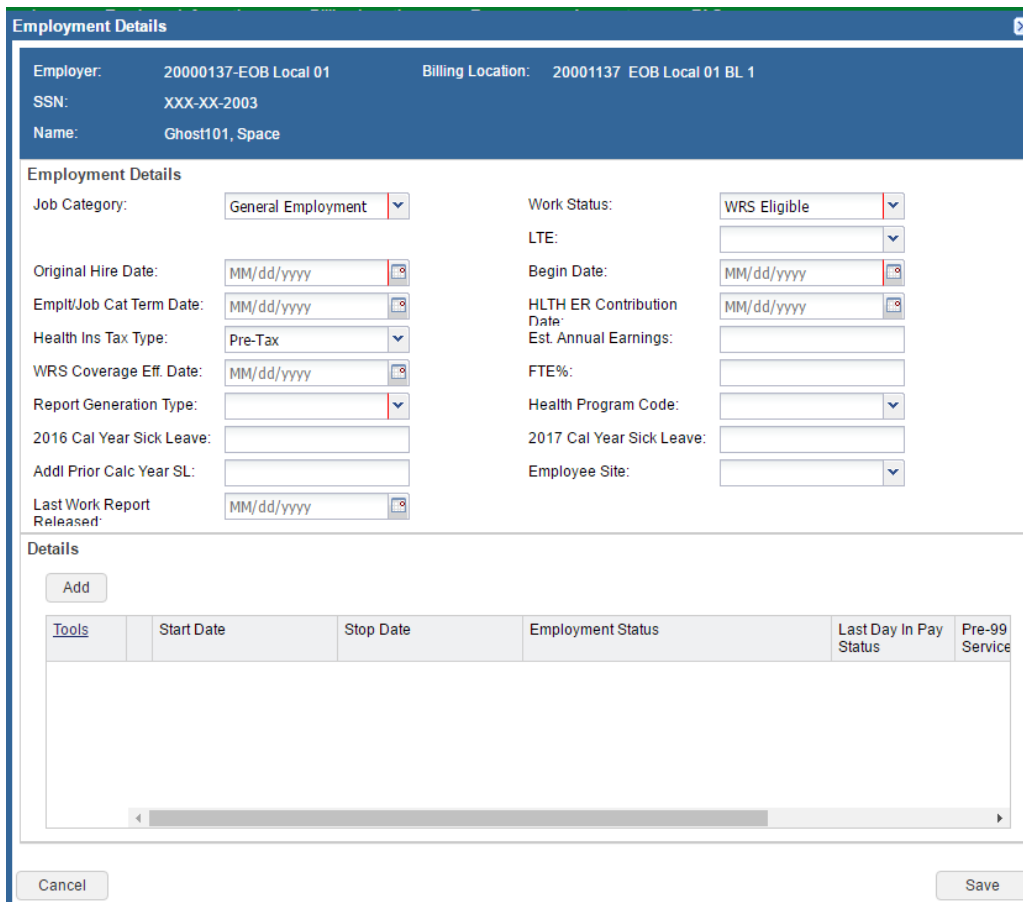
**Add Member Contract**

Billing Location: 20001137 EOB Local 01 BL 1

Cancel Continue

myETF opens the *Employment Details* pop-up displaying a blank Employment Details screen for the employee.

**Note** If you are trying to update the information for an employee's existing Job Category, select the **View Details** option next to the employee's record on the Roster that contains that Job Category (see [Viewing and Updating Member Contract Details](#)).



**Employment Details**

Employer: 20000137-EOB Local 01 Billing Location: 20001137 EOB Local 01 BL 1

SSN: XXX-XX-2003

Name: Ghost101, Space

**Employment Details**

Job Category: General Employment

Work Status: WRS Eligible

LTE:

Original Hire Date: MM/dd/yyyy

Begin Date: MM/dd/yyyy

Emplt/Job Cat Term Date: MM/dd/yyyy

HLTH ER Contribution Date: MM/dd/yyyy

Health Ins Tax Type: Pre-Tax

Est. Annual Earnings:

WRS Coverage Eff. Date: MM/dd/yyyy

FTE%:

Report Generation Type:

Health Program Code:

2016 Cal Year Sick Leave:

2017 Cal Year Sick Leave:

Addl Prior Calc Year SL:

Employee Site:

Last Work Report Released: MM/dd/yyyy

**Details**

Add

Tools	Start Date	Stop Date	Employment Status	Last Day In Pay Status	Pre-99 Service
<div> <div></div> <div></div> </div>					

Cancel Save

## 5) Update the fields in the Employment Details section as needed.

- **Job Category:** (Required) The category for the job the employee performs.
- **Work Status:** (Required) Indicates the WRS eligibility status.
- **LTE:** (State only) Indicates whether or not the employee is a limited term employee.
- **Original Hire Date:** (Required) Date the employee was originally hired at the employer, regardless of job category.
- **Begin Date:** (Required) Start date of the current employment record. Employment records are created when an employee is first hired, has a job category change, is assigned to a different payroll cycle, or has a work status change.
- **Emplt/Job Cat Term Date:** Date on which the employee was terminated or employment at the job category was terminated.
- **HLTH ER Contribution Date:** (Local Only) Date the employer health contributions begin (this is ER Contribution Date in the Payroll File Resource document).
- **Health Ins Tax Type:** Tax type under which the health insurance deduction is calculated (e.g., Pre-tax or Post-tax).
- **Est. Annual Earnings:** Estimated annual earnings for the employee.
- **WRS Coverage Eff. Date:** Date the employee's WRS Coverage began at the current employer. This is the WRS Enrollment Date.
- **FTE%:** (State Only) The percentage of full-time employment (e.g. 100 equals full-time employment).
- **Report Generation Type:** (Required) The reporting cycle on which the employee is paid.
- **Health Program Code:** (Local Only) The code for the Health Program in which the employee participates (this is Program Code in the Payroll File Resource document).
- **2016 Cal Year Sick Leave:** Populated by the system.
- **2017 Cal Year Sick Leave:** Populated by the system.
- **Addl Prior Cal Year SL:** Populated by the system.
- **Employee Site:** Location where employee primarily works or is assigned.
- **Last Work Report Released:** Populated by the system.

Employment Details	
Job Category:	General Employment
Work Status:	WRS Eligible
LTE:	
Original Hire Date:	01/02/2017
Begin Date:	03/04/2017
Emplt/Job Cat Term Date:	MM/dd/yyyy
HLTH ER Contribution Date:	MM/dd/yyyy
Health Ins Tax Type:	Pre-Tax
Est. Annual Earnings:	
WRS Coverage Eff. Date:	01/02/2017
FTE%:	
Report Generation Type:	Bi-Weekly
Health Program Code:	
2016 Cal Year Sick Leave:	
2017 Cal Year Sick Leave:	
Addl Prior Calc Year SL:	
Employee Site:	
Last Work Report Released:	MM/dd/yyyy

- 6) Scroll to the Details section.
- 7) Click **Add** to create a new record to the grid.
- 8) Click in each column of the new details record to update the following (the new record is light-grey in color until you enter the Start Date):
  - ➔ **Start Date:** Date you entered in the **Begin Date** field.
  - ➔ **Employment Status:** Select the option from the drop-down list.

Details

Add

Tools	Start Date	Stop Date	Employment Status	Last Day In Pay Status	Pre-99 Service
	03/04/2017		Active Employment		

- 9) Click **Save** after entering the information.

Employment Details

Employer: 20000137-EOB Local 01 Billing Location: 20001137 EOB Local 01 BL 1

SSN: XXX-XX-2003

Name: Ghost101, Space

Employment Details

Job Category: General Employment

Work Status: WRS Eligible

Original Hire Date: 01/02/2017

Begin Date: 03/04/2017

Empl/Job Cat Term Date: MM/dd/yyyy

HLTH ER Contribution Date: MM/dd/yyyy

Health Ins Tax Type: Pre-Tax

Est. Annual Earnings:

WRS Coverage Eff. Date: 01/02/2017

FTE%:

Report Generation Type: Bi-Weekly

Health Program Code:

2016 Cal Year Sick Leave:

2017 Cal Year Sick Leave:

Addl Prior Calc Year SL:

Employee Site:

Last Work Report Released: MM/dd/yyyy

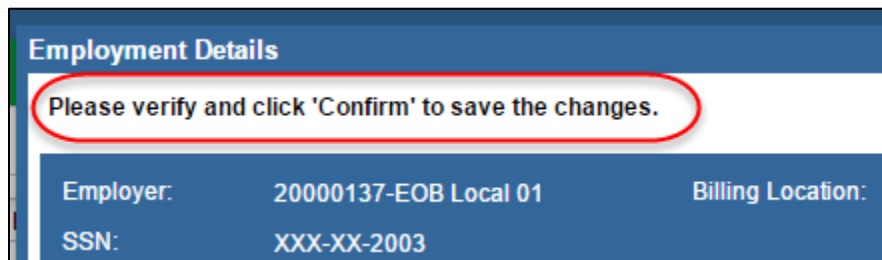
Details

Add

Tools	Start Date	Stop Date	Employment Status	Last Day In Pay Status	Pre-99 Service
	03/04/2017		Active Employment		

Cancel Save

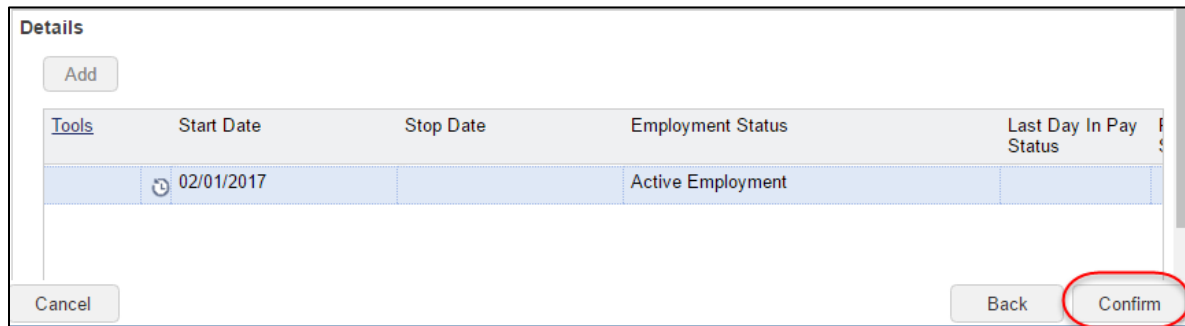
A confirmation message displays at the top of the window.



The screenshot shows a window titled "Employment Details". At the top, a message box with a red border contains the text "Please verify and click 'Confirm' to save the changes." Below this, the window displays the following information:

Employer:	20000137-EOB Local 01	Billing Location:
SSN:	XXX-XX-2003	

10) **Confirm** the information entered is correct.



The screenshot shows a window titled "Details". It contains an "Add" button at the top left. Below it is a table with the following columns: Tools, Start Date, Stop Date, Employment Status, and Last Day In Pay Status. The table has one row of data:

Tools	Start Date	Stop Date	Employment Status	Last Day In Pay Status
	02/01/2017		Active Employment	

At the bottom of the window, there are three buttons: "Cancel", "Back", and "Confirm". The "Confirm" button is circled in red.

**Note** Click the **Back** button to update the information if needed, then **Save** to continue.

After confirming the information, any validation errors that need correction display on the window. Use the **Back** button to correct the information described in the message.



## Viewing and Updating Member Contract Details

When you need to update or add details to a member's contract, use the *Actions > View Details* link for the employee's specific job category record. For example, you will update a member's contract when they go on leave, are terminated, or have a change in their work status. You may also need to update the employee's member contract when correcting validations on a work report. For example, you may need to update the employee's member contract if the Begin Date or Original Hire Date on the work report does not match the member contract for that job category. The specific validation being corrected will direct you to update the Roster when needed.

- 1) Search for an employee on the *Roster* tab. (See [Searching for an Employee Record](#).)
- 2) Click the **Actions** link next to the employee's job category record.
- 3) Select **View Details**.

myETF opens the *Employment Details* pop-up displaying the current information for the employee.

- 4) Click **Change** if the information shown needs to be update. (See [Adding Member Contract Information](#) for specific fields.)

**Employment Details**

Change

Employer: 0002299-Marathon County Sheriff      Billing Location: 0002299 Marathon County Sheriff

SSN: XXX-XX-3452

Name: Adesman, Brian

**Employment Details**

Job Category:	General Employment	Work Status:	WRS Eligible
Original Hire Date:	01/01/2000	LTE:	No
Emplt/Job Cat Term Date:	MM/dd/yyyy	Begin Date:	01/01/2000
Health Ins Tax Type:	Pre-Tax	HLTH ER Contribution Date:	MM/dd/yyyy
WRS Coverage Eff. Date:	01/01/2000	Est. Annual Earnings:	
Report Generation Type:	Monthly	FTE%:	
2016 Cal Year Sick Leave:		Health Program Code:	
Addl Prior Calc Year SL:		2017 Cal Year Sick Leave:	
Last Work Report Released:	MM/dd/yyyy	Employee Site:	

**Details**

Add

Tools	Start Date	Stop Date	Employment Status	Last Day In Pay Status
	01/01/2000		Active Employment	

Close

- 5) Click **Save** after updating the information.

- 6) **Confirm** the information is correct. (Use the **Back** button as needed to correct the information.)
- 7) Click **Save**.

**Note** After saving, any validation errors that need correction display on the window. Use the **Back** button to correct the information in the message.

## Viewing and Updating Employment Information

- 1) Search for an employee on the *Roster* tab. (See [Searching for an Employee Record](#).)
- 2) Click the **Actions** link next to the employee name.
- 3) Select **View Employee Info**.

myETF opens the *Employee* record, which contains four tabs.

- **Member Information:** (default tab) displays a Member Information and an Employment Information section
- **Work History:** displays the payroll records (See [Viewing a Member's Work History](#).)

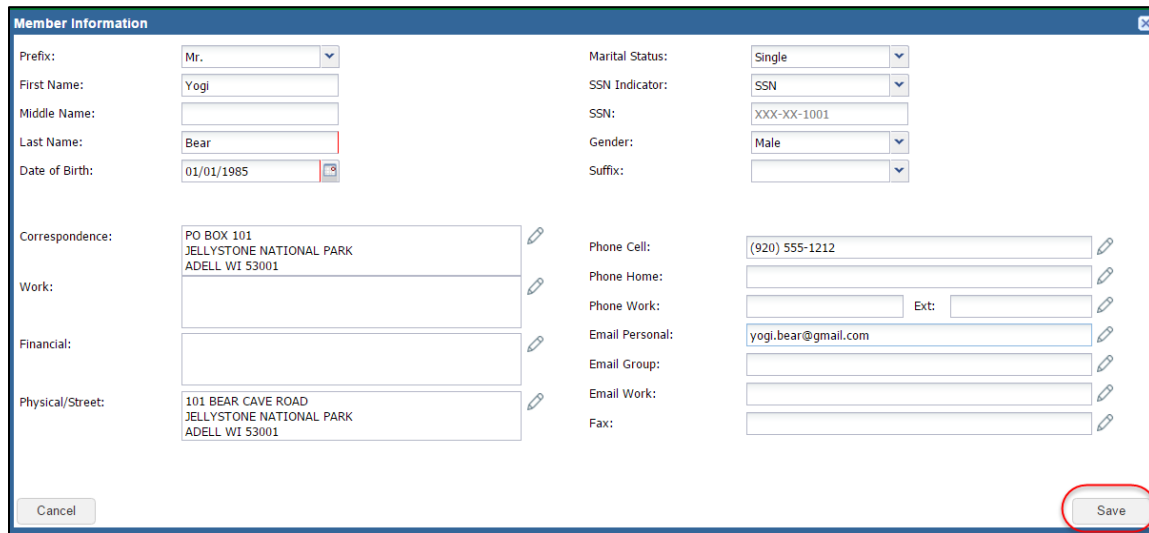
**Note** Click the **Back** button to return to the roster when needed. If you made updates to the record, save before clicking the **Back** button.

- 4) Click **Update** to change the demographic and contact information for the member.

The screenshot displays the myETF Employee Record interface. At the top, a header bar shows a **Back** button (circled in red), followed by member details: Name: Ghost101, Space; DOB: 02/28/1975; SSN: XXX-XX-2003. Below this is a green tab bar with **Member Information** and **Work History**. The **Member Information** tab is active, showing a blue sidebar and a main content area. In the main content area, the **Member Information** section has an **Update** button (circled in red). Below the button are fields for Prefix, First Name (Space), Middle Name, Gender (Male), Suffix, Marital Status, SSN Indicator, Last Name, and Date of Birth.

The Member Information sections displays the fields available for update.

- 5) Update the demographic information, addresses, and contact information as needed.
- 6) Click **Save**.



**Member Information**

Prefix: Mr. Marital Status: Single

First Name: Yogi SSN Indicator: SSN

Middle Name: SSN: XXX-XX-1001

Last Name: Bear Gender: Male

Date of Birth: 01/01/1985 Suffix:

Correspondence: PO BOX 101 JELLYSTONE NATIONAL PARK ADELL WI 53001 Phone Cell: (920) 555-1212

Work: Phone Home:

Financial: Phone Work: Ext:

Physical/Street: 101 BEAR CAVE ROAD JELLYSTONE NATIONAL PARK ADELL WI 53001 Email Personal: yogi.bear@gmail.com

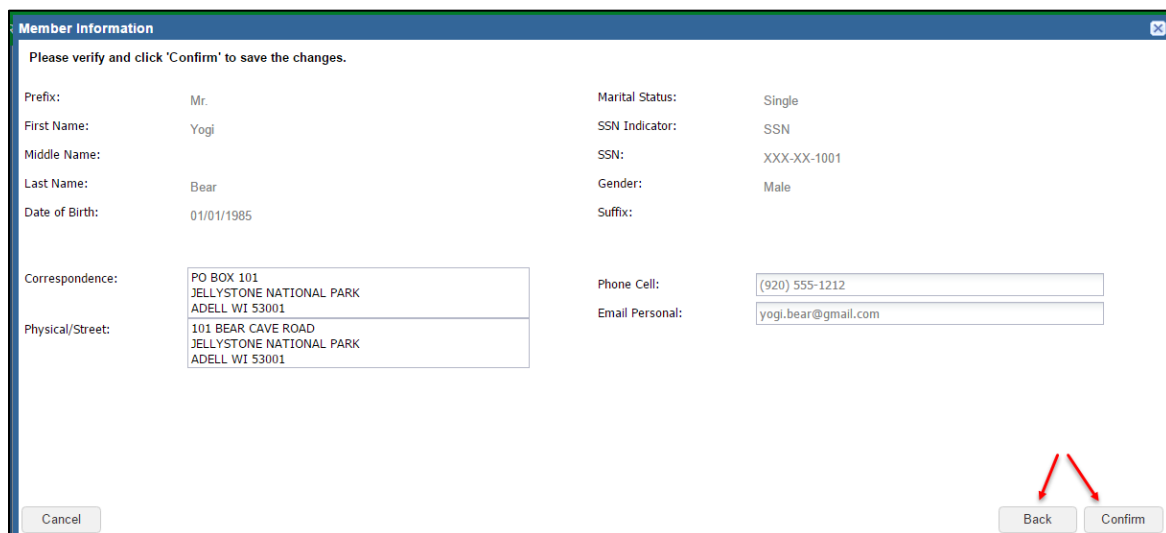
Email Group:

Email Work:

Fax:

Cancel Save

- 7) Review the information entered.
- 8) Click **Confirm**. (Use the **Back** button if you need to correct the information.)



**Member Information**

Please verify and click 'Confirm' to save the changes.

Prefix: Mr. Marital Status: Single

First Name: Yogi SSN Indicator: SSN

Middle Name: SSN: XXX-XX-1001

Last Name: Bear Gender: Male

Date of Birth: 01/01/1985 Suffix:

Correspondence: PO BOX 101 JELLYSTONE NATIONAL PARK ADELL WI 53001 Phone Cell: (920) 555-1212

Physical/Street: 101 BEAR CAVE ROAD JELLYSTONE NATIONAL PARK ADELL WI 53001 Email Personal: yogi.bear@gmail.com

Cancel Back Confirm

myETF displays the Member Information section with the updated information.

**Member Information**

Update

Prefix:	Mr.	Marital Status:	Single
First Name:	Yogi	SSN Indicator:	SSN
Middle Name:		SSN:	XXX-XX-1001
Last Name:	Bear	Gender:	Male
Date of Birth:	01/01/1985	Suffix:	
Correspondence:	PO BOX 101 JELLYSTONE NATIONAL PARK ADELL WI 53001	Phone Cell:	(920) 555-1212
Physical/Street:	101 BEAR CAVE ROAD JELLYSTONE NATIONAL PARK ADELL WI 53001	Email Personal:	yogi.bear@gmail.com

- 9) Click the **Actions** link next to an employment record in the Employment Information section to do the following:

- ➔ **Add Member Contract** (See [Adding Member Contract Information.](#))
- ➔ **View Details** (See [Viewing and Updating Member Contract Details.](#))
- ➔ **Insurance Enrollment** (Do not use for Confirmation.)

Employment Information							
Tools	Employer Name	Employer Billing Location	Job Category	Work Status	Begin Date	Original Hire Date	Employment/Job Category Termination Date
Actions	Marathon Cou...	Marathon County Sheriff	General Employment	WRS Eligible	12/01/2016	12/01/2016	12/31/2016

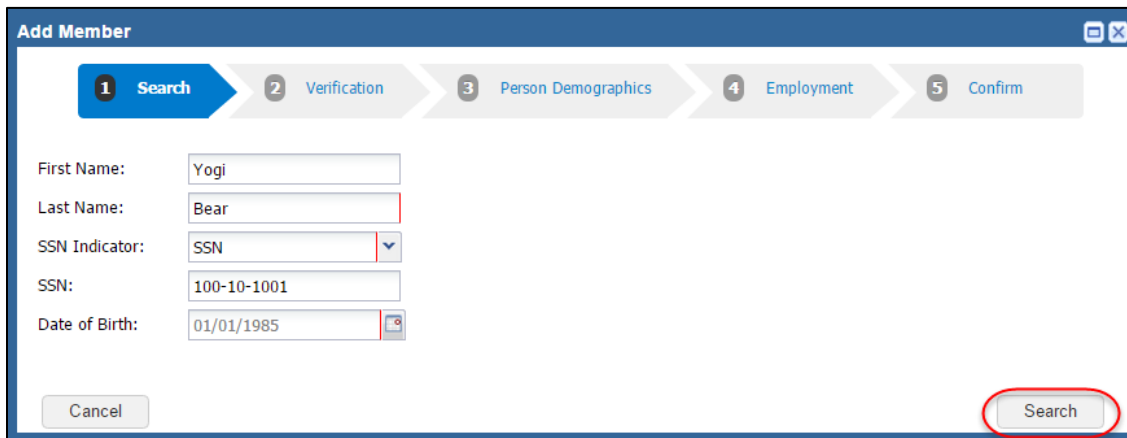
The changes you make are updated and reflected in the myETF portals accessed by ETF staff and the member.

## Adding a New Hire

Use the *Add Member Wizard* when you are adding an employee to your billing location and **no record currently exists** on the employment roster for that billing location for the employee.

**Note** If an employee already has a record on the roster for the specified billing location, use *the Actions > Add Member Contract* option to create the new Job Category employment instead.

- 1) Open the *Add Member* wizard using one of the following options:
  - Click the **Enroll an Employee** link in the I Want To... section of the *Home* page.
  - Select the **Add New Hire** button on the *Roster* tab.
- 2) Enter the following information in the *Search* page of the wizard.
  - **First Name**
  - **Last Name** (required):
  - **SSN Indicator** (required): defaults to SSN
  - **SSN**: when available and the **SSN indicator** selected is SSN
  - **Date of Birth** (required)
- 3) Click **Search**.



myETF displays the *Verification* page for you to review the information entered.

- 4) Click **New Member** if the information is correct.

If the information is incorrect, click the **Back** button to make the correction.

**Add Member**

1 Search 2 **Verification** 3 Person Demographics 4 Employment 5 Confirm

Entered Fields

First Name: Yogi  
Last Name: Bear  
SSN Indicator: SSN  
SSN: 100101001  
Date of Birth: 01/01/1985

This member is not found.

Cancel Back New Member

myETF displays the *Person Demographics* page for you to enter additional information, addresses, and contact (phone/email) information.

5) Update the following information if available:

- **Prefix**
- **Marital Status**
- **Gender** (required)
- **Suffix**

6) Add addresses for **Correspondence**, **Work**, **Financial**, and/or **Physical Street** address by clicking in the appropriate text box and completing the information in the *Addresses* pop-up. (See [Adding and Updating Addresses](#).)

**Note** The address types you will be able to update when myETF goes live may be different or limited.

7) Add contact information for **Phone**, **Email**, and/or **Fax** by typing the numbers directly in the appropriate text box. (See [Adding and Updating Contact Information](#).)

8) Click **Next**.

**Add Member**

1 Search 2 Verification 3 **Person Demographics** 4 Employment 5 Confirm

Prefix: Mr. (dropdown)  
First Name: Yogi  
Middle Name:   
Last Name: Bear  
Date of Birth: 01/01/1985

Marital Status: Single (dropdown)  
SSN Indicator: SSN (dropdown)  
SSN: XXX-XX-1001  
Gender: Male (dropdown)  
Suffix: (dropdown)

Correspondence:   
Work:   
Financial:   
Physical/Street:

Phone Home:   
Phone Cell:   
Phone Work:   
Email Group:   
Email Personal:   
Email Work Email:   
Fax:

Cancel Back **Next**

myETF displays the *Employment* page of the wizard.

9) Verify and/or enter the following information:

- ➔ **Billing Location:** Name of the location through which the member is paid. For most employers, the billing location is the same as your ETF ID (Employer ID).
- ➔ **Agreement:** Read-only, system-generated field based on the billing location.
- ➔ **Original Hire Date:** Date the employee was hired at the employer (regardless of job category).
- ➔ **WRS Coverage Eff Date:** Date on which the WRS coverage is effective.
- ➔ **LTE:** Indicates whether or not the member is a limited term employee.
- ➔ **Report Generation Type:** The reporting cycle on which the employee is paid.
- ➔ **Job Category:** Category in which the member works or will work.
- ➔ **Work Status:** WRS eligibility status.
- ➔ **Begin Date:** Date the current employment record begins. For a new hire, this is the same date as the Original Hire Date.
- ➔ **Employment Status:** Employment status of the member upon enrollment. For new hires, this is either Active Employment or Occasional Active Employment.

10) Click **Next**.

The screenshot shows the 'Add Member' wizard with five steps: 1 Search, 2 Verification, 3 Person Demographics, 4 Employment (current), and 5 Confirm. Member information at the top includes First Name: Yogi, Last Name: Bear, SSN: 100-10-1001, and Birth Date: 01/01/1985. The Employment section contains the following fields:

Billing Location:	0002299 Marathon County Sheriff	Job Category:	General Employment
Agreement:	State Employer 1	Work Status:	WRS Eligible
Original Hire Date:	12/01/2016	Begin Date:	12/01/2016
WRS Coverage Eff. Date:	12/01/2016	Employment status:	Active Employment
LTE:	No		
Report Generation Type:	Monthly		

At the bottom, there are 'Cancel', 'Back', and 'Next' buttons. The 'Next' button is circled in red.

myETF displays the *Confirm* page of the wizard.

11) Review the information on the page.

12) Click **Confirm** if the information is correct.



You can correct the information entered by clicking the **Back** button.

myETF displays the *Member Information* tab for the member's record.

You can access this window at any time by clicking the **Action** link next to the member's record on the *Roster* tab and selecting **View Employee Info**. (See [Viewing and Updating Employment Information](#).)

**Note** Only *Member Information* and *Work History* tabs are available for myETF Employer Reporting Confirmation.

- 13) Click the **Back** button to return to the *Roster* tab.
- 14) Click the **Actions** link next to the new employee's record in the Roster grid.
- 15) Click **View Details** to open the *Member Contract* window for the new employment.
- 16) Ensure that all information in the Employment section is complete.

**Note** If the information shown is not complete, including the information in the Details section of the Member Contract window, it can be changed using step 17.

17) Click **Change**.

- Update information in the Employment Details section as needed.
- Update the information in the Details section for the member's employment if not already shown. To update click **Add** in the Details section and complete the **Start Date** and **Employment Status**.
- Click **Next**.
- Confirm the information shown on the window.
- Click **Save** to complete the employment record.

## Viewing a Member's Work History

You can review the Work History for a member from the *Work History* tab of their employment record. This is a read-only window. No changes can be made on this window.

From the *Roster* tab:

- 1) Search for an employee on the *Roster* tab. (See [Searching for an Employee Record](#).)
- 2) Click the **Actions** link next to the employee name.
- 3) Select **View Employee Info**.  
myETF displays the *Member Information* tab by default.
- 4) Click the *Work History* tab.

myETF displays the member's work history based on the Date Range selected. In the example below, the work history shown is for the Last 90 Days, based on the Payroll File information and work reports submitted for the employer. The status of the reports shown are Initial, which indicates the work report has not been submitted to ETF and Posted (submitted to ETF).

Back

Name: Flintson101, Fredrick

DOB: 12/10/1976

SSN: XXX-XX-2004

Member Information

Work History

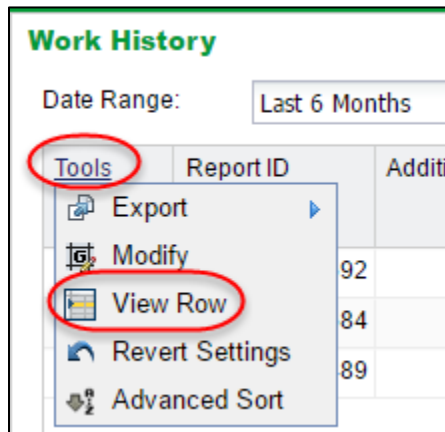
Work History

Date Range: 

Last 90 Days

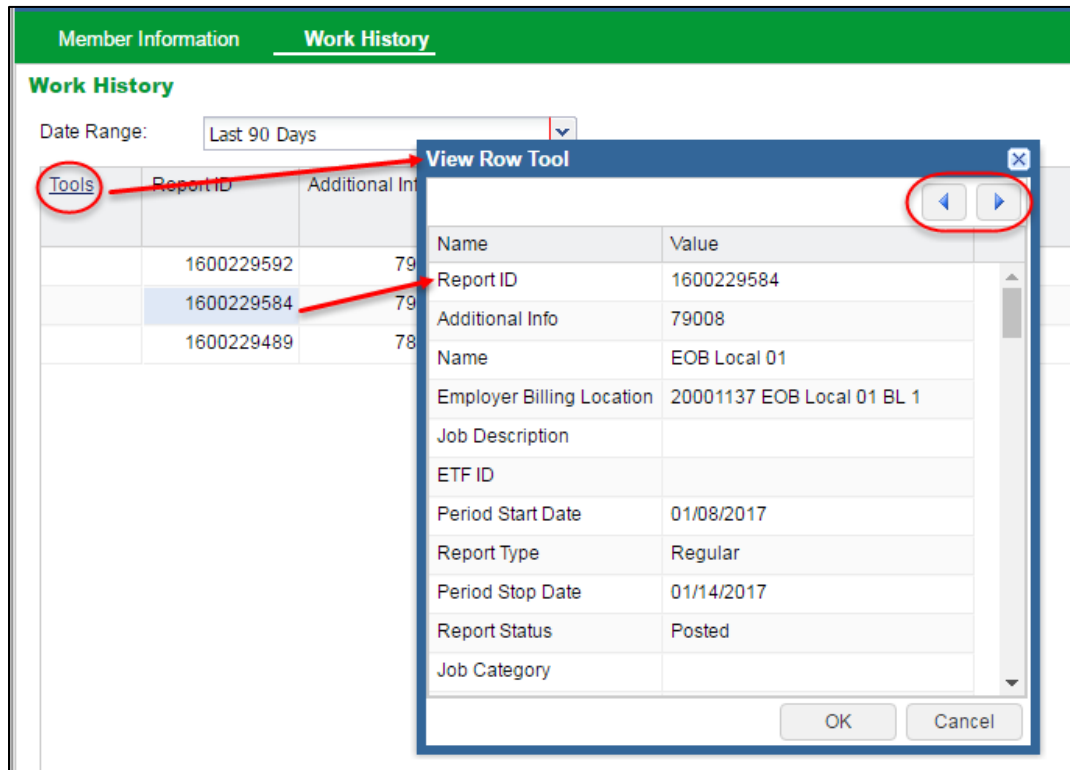
Tools	Report ID	Additional Info	Name	Employer Billing Location	Job Description	ETF ID	Period Start Date	Report Type	Period Stop Date	Report Status	Job Category	Post Date
	1600229592	79016	EOB Local 01	20001137 EO...			01/15/2017	Regular	01/21/2017	Initial		
	1600229584	79008	EOB Local 01	20001137 EO...			01/08/2017	Regular	01/14/2017	Posted		
	1600229489	78913	EOB Local 01	20001137 EO...			01/01/2017	Regular	01/07/2017	Posted		

To view the record in the grid in a vertical format, click the **Tools** link in the grid header and select the **View Row** option.

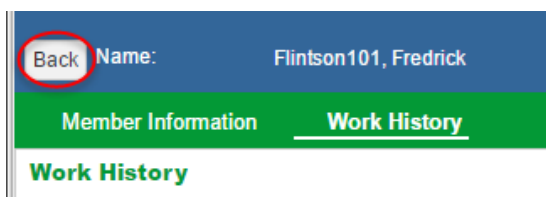


The *View Row Tool* pop-up displays on the window.

After reviewing the information, click **OK** to close the *View Row* pop-up.



- 5) Click the **Back** button next to the member's name in the window header to return to the *Roster* tab.



## Using the Accounts Tab

Use the *Accounts* tab to review transactions for your employer. In addition to reviewing your transactions you can use this to do the following:

- Upload a file (Payroll, Employment, or Insurance)
- Review your file history
- Make a one-time payment (not available during myETF Employer Reporting Confirmation)
- Review your payment history (not available during myETF Employer Reporting Confirmation)
- Create a manual work report

Tools	Activity Date	Trans No	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Addl EE	Addl ER	Misc	
<a href="#">Actions</a>	03/21/2017	78989	Work Report	WR: Monthly, 12/25/2016 - 01/07/2017	Open	Initial		\$0.00	\$0.00	\$0.00	\$0.00
<a href="#">Actions</a>	01/15/2017	79016	Work Report	WR: Weekly, 01/15/2017 - 01/21/2017	Open	Initial		\$0.00	\$0.00	\$0.00	\$0.00
<a href="#">Actions</a>	03/27/2017	79017	Work Report	WR: Bi-Weekly, 01/01/2017 - 01/14/2017	Open	Initial	02/24/2017	\$0.00	\$0.00	\$0.00	\$0.00
<a href="#">Actions</a>	03/23/2017	79008	Work Report	WR: Weekly, 01/08/2017 - 01/14/2017	Open	Posted	02/24/2017	\$0.00	\$0.00	\$0.00	\$0.00
<a href="#">Actions</a>	03/29/2017	79052	Work Report	WR: Bi-Weekly Sun-W1, 12/25/2016 - 01/07/2017	Open	Initial	02/24/2017	\$0.00	\$0.00	\$0.00	\$0.00

## Searching for Account Transactions

Account transactions are debit and credit activities that translate to balances due from employers to ETF. Debit transactions are typically those that create a balance due to ETF (e.g., Work Reports, positive balance Adjustment Work Reports, Interest due, etc.). Credit transactions reduce the amounts due (e.g., Payments, or negative Adjustment Work Reports).

When a transaction has a remaining balance (either credit or debit) that is not fully offset by another transaction (e.g., work report paid by a payment), the transaction status is considered "Open." When the balance is fully satisfied, the transaction is "Closed." Closed transactions may be reopened by ETF when needed.

Offset transactions must be applied to each other to close the transaction (e.g., a payment(s) must be "applied" to a work report balance in full to close the open work report transaction. A payment that is more than the balance of a work report stays in "Open" status until the remaining portion is applied to another debit type transaction).

- 1) Log in to myETF Employer Online Services.
- 2) Select the *Accounts* tab.

3) Enter information in the filters section as needed.

- **Billing Location Name**
- **Trans Type:** For Confirmation, only select All Work Reports.
- **Status:**(e.g., Open or Closed)
- **Report Status:** (e.g., Initial, Pending, Released)

The screenshot shows the 'Accounts' tab in the myETF system. The filter section includes fields for Billing Location Name (20001137 EOB Local 01 BL 1), Trans Type (All), Status (Open), and Report Status (All). To the right are buttons for Upload File, File History, Manual Report, Payments, and Payment History. Below the filters are 'Show Funds' and 'Show Fund Groups' buttons. The main grid displays transaction data with columns: Tools, Activity Date, Trans No, Trans Type, Trans Identifier, Trans Status, Report Status, Due Date, Addl EE, Addl ER, Misc, and Amount.

Tools	Activity Date	Trans No	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Addl EE	Addl ER	Misc	Amount
<a href="#">Actions</a>	03/21/2017	78989	Work Report	WR: Monthly, 12/25/2016 - 01/07/2017	Open	Initial		\$0.00	\$0.00		\$0.00
<a href="#">Actions</a>	01/15/2017	79016	Work Report	WR: Weekly, 01/15/2017 - 01/21/2017	Open	Initial		\$0.00	\$0.00		\$0.00
<a href="#">Actions</a>	03/27/2017	79017	Work Report	WR: Bi-Weekly, 01/01/2017 - 01/14/2017	Open	Initial	02/24/2017	\$0.00	\$0.00		\$0.00
<a href="#">Actions</a>	03/23/2017	79008	Work Report	WR: Weekly, 01/08/2017 - 01/14/2017	Open	Posted	02/24/2017	\$0.00	\$0.00		\$0.00
<a href="#">Actions</a>	03/29/2017	79052	Work Report	WR: Bi-Weekly Sun-W1, 12/25/2016 - 01/07/2017	Open	Initial	02/24/2017	\$0.00	\$0.00		\$0.00

myETF filters the data in the Account grid based on the information entered.

4) Click the **Actions** link next to a transaction and select the appropriate option to review the transaction information. (The following options are available for work reports only.)

- **Work Report Editor:** Opens the Work Report Editor window for a work report.
- **Submit:** Submits a work report to ETF for release (only available when Report Status is "Initial"). A submitted work report is an employer's acknowledgement that all information included in the report is correct and that the amount due on the report is valid.
- **Delete:** Deletes a work report that has not been submitted.

This screenshot is a zoomed-in view of the 'Actions' dropdown menu for the first transaction in the grid. The menu options are: Work Report Editor, Submit, and Delete. The 'Tools' column header is also visible.

Tools	Activity Date	Trans No	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Addl EE	Addl ER	Misc	Amount
<a href="#">Actions</a>	03/21/2017	78989	Work Report	WR: Monthly, 12/25/2016 - 01/07/2017	Open	Initial		\$0.00	\$0.00		\$0.00
		79016	Work Report	WR: Weekly, 01/15/2017 - 01/21/2017	Open	Initial		\$0.00	\$0.00		\$0.00
		79017	Work Report	WR: Bi-Weekly, 01/01/2017 - 01/14/2017	Open	Initial	02/24/2017	\$0.00	\$0.00		\$0.00
		79008	Work Report	WR: Weekly, 01/08/2017 - 01/14/2017	Open	Posted	02/24/2017	\$0.00	\$0.00		\$0.00
		79052	Work Report	WR: Bi-Weekly Sun-W1, 12/25/2016 - 01/07/2017	Open	Initial	02/24/2017	\$0.00	\$0.00		\$0.00

## Uploading a File through myETF Employer Online Services

Use the *Accounts* tab's **Upload File** button to upload a Payroll, Employment, or Insurance File. After the file is uploaded successfully, myETF runs validations for formatting and required data. If no errors or exceptions are found, myETF automatically processes the file to create the records on a Work Report (Payroll File) or sends the information directly to ETF (Employment or Insurance Files). To upload a file through the SFTP site, see [Uploading a File Through the SFTP Site](#).

ETF recommends the following file naming convention for **files uploaded directly** through myETF Employer Online Services:

- **Payroll File Naming Conventions:**

- ➔ ETF\_Payroll\_[EmpETF\_ID]\_[paydate].csv (paydate formatted as mmddyyyy)
- ➔ ETF\_Payroll\_[EmpETF\_ID]\_[paydate].xml (paydate formatted as mmddyyyy)

- **Employment File Naming Conventions:**

- ➔ ETF\_Employment\_[EmpETF\_ID]\_[currentdate].csv (currentdate formatted as mmddyyyy)
- ➔ ETF\_Employment\_[EmpETF\_ID]\_[currentdate].xml (currentdate formatted as mmddyyyy)

Please note that files uploaded through the SFTP site **must** follow the file naming convention listed in [Uploading a File Through the SFTP Site](#).

ETF recommends the following Import Descriptions for the Payroll and Employment Files:

- **Payroll File Import Description:**

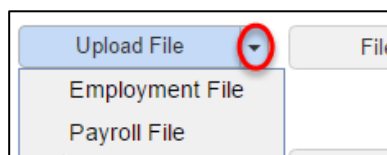
- ➔ EmpETF\_ID and/or EmpName, Paydate

- **Employment File Import Description:**

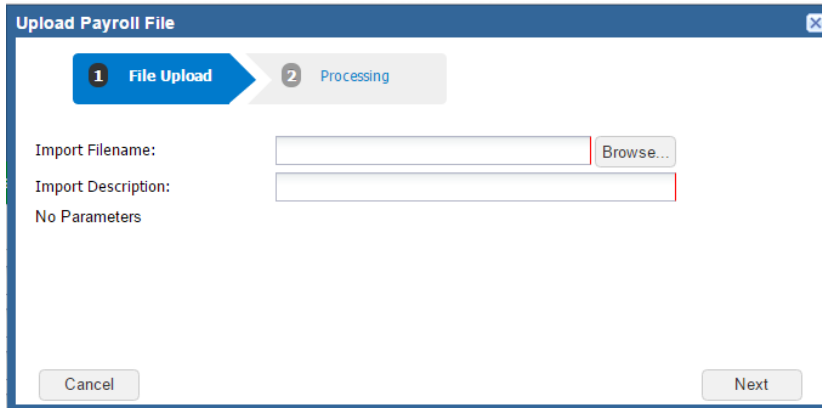
- ➔ EmpETF\_ID and/or EmpName

If any errors are located during the initial upload validation process, the **Status** of the file becomes **Validated with Errors**. If only exceptions are located during validation, the Status of the file is **Validated with Exceptions**. The errors must be corrected and the file manually re-validated and then processed. Exceptions should be reviewed, but are not required to be corrected.

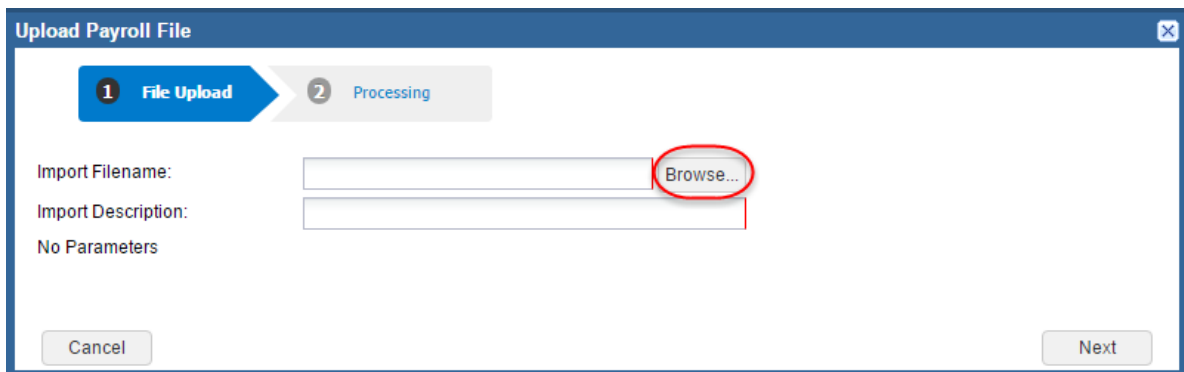
- 1) Log in to myETF Employer Online Services.
- 2) Open the *Upload [file type] File* wizard by using one of the following options:
  - ➔ Selecting the **Upload a New Payroll File** link on the *Home* page in the I Want To... section to open the *Upload Payroll File* wizard. (For Payroll Files only at this time.)
  - ➔ Clicking the *Accounts* tab and then, clicking the **Upload File** button and selecting the type of file from the drop-down list. (For both Payroll File and Employment File uploads,



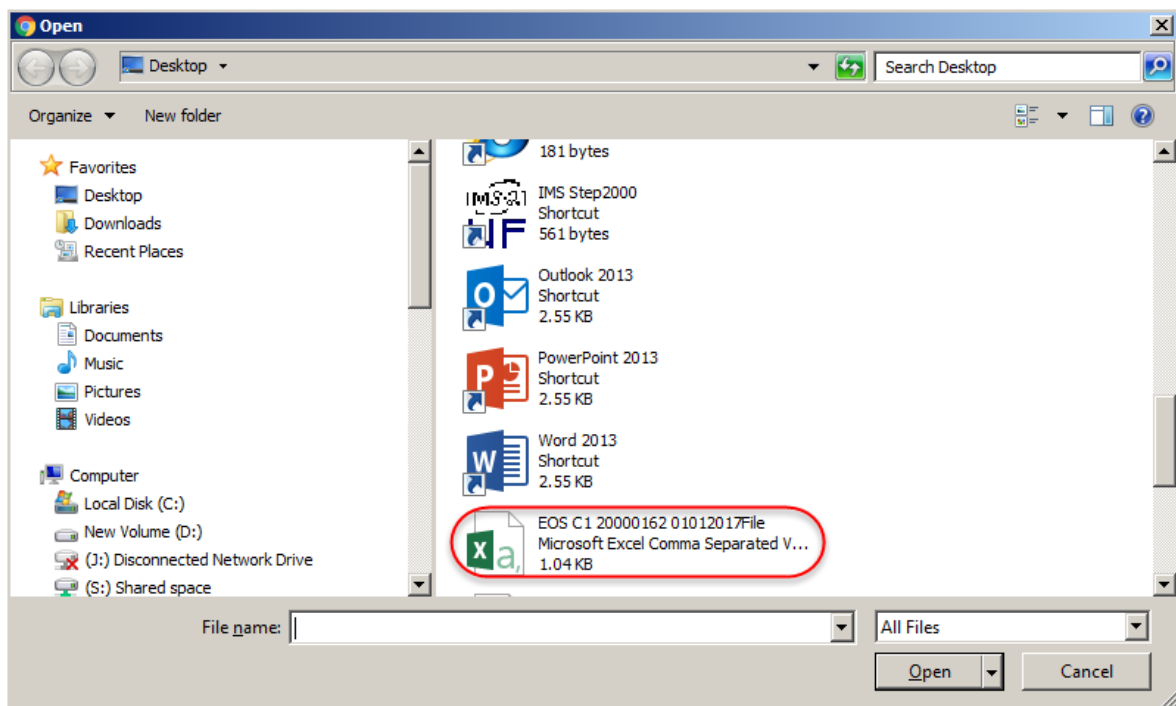
myETF opens the appropriate *Upload [file type] File* wizard based on the type of file selected from the drop-down list.)



- 3) Click **Browse** to open the *Save As* or *Open* pop-up (depending on your browser).



- 4) Locate and double-click the file to be uploaded in the *Save As* or *Open* pop-up.



myETF populates the **Import Filename** field with the name of the selected file.

- 5) Enter a **Description** for the import (e.g. EmpETF\_ID and/or EmpName, Paydate).
- 6) Click **Next**.

The screenshot shows the 'Upload Payroll File' wizard window. At the top, there are two steps: '1 File Upload' (active) and '2 Processing'. Below the steps, there are three input fields: 'Import Filename:' with the value 'Payroll 20000161 02012017.csv' and a 'Browse...' button; 'Import Description:' with the value 'Payroll 20000161 2/1/2017'; and 'No Parameters'. At the bottom left is a 'Cancel' button, and at the bottom right is a 'Next' button, which is circled in red. Red arrows point to the 'Import Filename' and 'Import Description' fields.

myETF displays a message on the *Processing* page of the *Upload Payroll File* wizard with a message 'Processing upload...' After the file upload completes, the Results message indicating the success or failure of the upload displays on the screen. If the file failed to upload, the Results Message will also indicate the reason for failure.

- 7) Click **Details**.

The screenshot shows the 'Upload Payroll File' wizard window at the 'Processing' step. The '1 File Upload' step is now greyed out, and '2 Processing' is active. A 'Results' message box is displayed, stating 'The file has been submitted for processing.' This message box is circled in red. At the bottom, there are three buttons: 'Close', 'Back', and 'Details'. A red arrow points from the 'Details' button to the 'Results' message box.



myETF opens the *Import Details > Details* screen. The **Import Status** displays in the header. In the grid, the *Import Detail Status* column displays the status of each record in the imported file.

**Import Details**

Save Cancel

File Name Payroll File File Load Date 12/15/2016  
 Import Description Payroll File 11/20  
 Import Status Validated with Errors Processing Status Ready

Summary **Details**

View Rows: Show All Rows Display Rows: From To: Show Deleted Rows: ☐

New Row Validate Void Download

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type	Employer (ER) ETF ID	Billing Loc ID	Report Gen Type	Period Start
<a href="#">Actions</a>	1		Validated With Exceptions	<input type="checkbox"/>	N	0002299	0002299	M00	20161009
<a href="#">Actions</a>	2		Validated With Errors	<input type="checkbox"/>	N	0002299	0002299	M00	20161009
<a href="#">Actions</a>	3		Validated With Exceptions	<input type="checkbox"/>	N	0002299	0002299	M00	20161009
<a href="#">Actions</a>	4		Validated With Errors	<input type="checkbox"/>	N	0002299	0002299	M00	20161009
<a href="#">Actions</a>	5		Validated Successfully	<input type="checkbox"/>	N	0002299	0002299	M00	20161009
<a href="#">Actions</a>	6		Validated With Errors	<input type="checkbox"/>	N	0002299	0002299	M00	20161009

The next steps are to correct the errors (and exceptions as needed) on each record of the file. (See [Correcting an Uploaded File](#).)

- 8) Click **Save** in the upper-left corner of the window, then click **Close** to close the *Import Details* window when you finish your review or corrections.

## Locating an Uploaded File

After a file is uploaded, you can review the file by clicking the **File History** button on the *Accounts* tab. All files uploaded directly through myETF Employer Online Services or through the SFTP site (see [Uploading a File Through the SFTP Site](#)) may be found in this location.

- 1) Log in to myETF Employer Online Services as shown in [Logging In](#).
- 2) Select the *Accounts* tab.
- 3) Select the **Billing Location** from the drop-down list as needed.
- 4) Click the **File History** button.

myETF opens the *File History* window.

File History

Close

File Definition: All Date Range: 10/14/2016 To: 12/13/2016

Status: All

Tools	Import Header ID	Process Flag	Inserted Date	File Definition	Import Description	Status	File Load Start	File Process Start
<a href="#">Actions</a>	2684	Completed	11/09/2016	Payroll File	Payroll File 11/...	Processed with Exceptions	11/09/2016 09:...	11/09/2016 09:...
<a href="#">Actions</a>	2682	Completed	11/09/2016	Payroll File	Payroll File 11/...	Voided	11/09/2016 09:...	
<a href="#">Actions</a>	2677	Completed	11/08/2016	Payroll File	11/09/2016 PR...	Voided	11/08/2016 05:...	
<a href="#">Actions</a>	2656	Ready	10/18/2016	Payroll File	Marathon coun...	Validated with Errors	10/18/2016 05:...	
<a href="#">Actions</a>	2655	Ready	10/17/2016	Payroll File	Type a Descri...	Validated with Errors	10/17/2016 03:...	
<a href="#">Actions</a>	2654	Validated	10/17/2016	Payroll File	Payroll File sa...	Validated with Errors	10/17/2016 01:...	10/17/2016 03:...
<a href="#">Actions</a>	2653	Completed	10/17/2016	Payroll File	PR File for Ma...	Voided	10/17/2016 01:...	
<a href="#">Actions</a>	2652	Completed	10/17/2016	Payroll File	Payroll File ex...	Voided	10/17/2016 12:...	

- 5) Use the filter fields to locate the appropriate file (not all fields may be needed).
  - ➔ **File Definition:** Select the file type (Payroll, Employment, or Insurance). Currently, only Payroll File and Employment File are available.
  - ➔ **Status:** Select the appropriate Status for the file as needed (e.g., Validated with Errors). See table below.
  - ➔ **Date Range (from and to fields):** Enter a date range during which the file was uploaded or validated with errors.

myETF filters the files in the File History grid as you enter the criteria.

- 6) Click the **Actions** link next to appropriate file.
- 7) Select the appropriate option:
  - ➔ **Validate:** Runs the validation process on the file to determine if errors or exceptions exist and/or were corrected.
  - ➔ **Details:** Opens the *Details* window to review or correct records included in the uploaded file.
  - ➔ **Process:** Processes the records in the file to create a Work Report (from a Payroll File) or directly into myETF (for Employment and Insurance files). The Process option is only enabled after a file validates without errors.
  - ➔ **Void:** Removes the original file from further processing. A file may be voided prior to "Processing."
  - ➔ **Download:** Download the contents of the file to your computer or network drive.

myETF opens the appropriate window or performs the function selected.

## Uploaded File Status Definitions

The following table describes each file status.

Uploaded File Status	Description
■ All	Displays all files regardless of status
■ Not Processed	File was uploaded but not processed
■ Validated Successfully	File validated successfully after correction of initial validation errors on upload. File needs to be processed.
■ Validated with Exceptions	File contains validation exceptions. If no errors are present, file may be processed.
■ Validated with Errors	File contains validation errors that must be corrected before it can be processed.
■ Processed Successfully	File is processed and data created a work report (if Payroll File) or updated records in myETF (if Employment or Insurance file). No further action can be taken on the file.
■ Processed with Exceptions	File processed with exceptions. If file is a Payroll File, review the work report and update as needed prior to submission.
■ Processed with Errors	File processed with errors. Update the file details screen to correct the errors shown and then re-process the file.
■ Voided	File was voided by a user and is not available for use. Re-upload a corrected file as needed.

## Correcting an Uploaded File

When a file validates with errors or exceptions, myETF stops the file from further processing. You must correct any errors identified in the file. It is recommended that you review the exceptions, though these do not need to be corrected to continue processing the file.

When a file contains numerous errors or numerous records that contain similar types of errors, it may be more efficient to void the file (see [Voiding an Uploaded File](#)), correct the file offline, and re-upload the corrected file.

- If you are using the *Upload File Wizard*, click the **Details** button immediately after you upload the file to open the *Import Details* window.
- If you uploaded the file through the SFTP site or the *Upload File* wizard, but left the file corrections until a later date, click the **File History** button to locate the uploaded file as described in [Locating an Uploaded File](#).

**Import Details**

Save Cancel

File Name: Payroll File    File Load Date: 03/14/2017  
 Import Description: Tester 1 Payroll File 031417  
 Import Status: Validated with Errors    Processing Status: Ready

Summary **Details**

Import Detail Status: All    Display Rows: From    To:    Show Deleted Rows: ☐

New Row   Set All to Resubmit   Set None to Resubmit   Validate   Void   Download

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type	Employer (ER) ETF ID	Billing Loc ID	Report Gen Type	Period Start Date
<a href="#">Actions</a>	1		Validated With Errors	<input type="checkbox"/>	N	20000137	20001137		20170101
<a href="#">Actions</a>	2		Validated With Errors	<input type="checkbox"/>	N	20000137	20001137		20170101
<a href="#">Actions</a>	3		Validated With Errors	<input type="checkbox"/>	N	20000137	20001137		20170101
<a href="#">Actions</a>	4		Validated With Errors	<input type="checkbox"/>	N	20000137	20001137		20170101
<a href="#">Actions</a>	5		Validated With Errors	<input type="checkbox"/>	N	20000137	20001137		20170101

When you open the *Import Details* window, the *Details* tab displays in edit mode by default.

There may be a number of rows that need review and correction.

- 1) Filter the rows shown by clicking the **Import Details Status** drop-down list.
- 2) Select the option **Validated with Errors** to display only rows that have errors (or **Validated with Exceptions** to show rows with exceptions).

**Import Details**

Save Cancel

File Name: Payroll File    File Load Date: 03/14/2017  
 Import Description: Tester 1 Payroll File 031417  
 Import Status: Validated with Errors    Processing Status: Ready

Summary **Details**

Import Detail Status: Validated With Errors    Display Rows: From    To:    Show Deleted Rows: ☐

New Row   Set All to Resubmit   Set None to Resubmit   Validate   Void   Download

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type
<a href="#">Actions</a>	1		Validated With Errors	<input type="checkbox"/>	N
<a href="#">Actions</a>	2		Validated With Errors	<input type="checkbox"/>	N
<a href="#">Actions</a>	3		Validated With Errors	<input type="checkbox"/>	N

- 3) Click the **Actions** link next to a row and then select the **Show Errors** option to view *Import Errors and Exceptions* pop-up with the errors for that row.

<a href="#">Tools</a>	Seq No	Import Message	Import Detail Status	Resubmit Flag
<a href="#">Actions</a>	1		Validated With Errors	<input type="checkbox"/>
Delete			Validated With Errors	<input type="checkbox"/>
Show Errors			Validated With Errors	<input type="checkbox"/>
<a href="#">Actions</a>	4		Validated With Errors	<input type="checkbox"/>

**Note** The *Import Errors and Exceptions* pop-up can be resized and dragged to another part of your screen to see both the errors for the row and use the scroll bars or the View Row Tool to correct the errors.

The screenshot displays two overlapping windows from the myETF system. The 'Import Details' window on the left shows a table of import details with columns for 'Tools', 'Seq No', and 'Import'. A 'View Row Tool' pop-up is open over this table, showing fields like 'Name', 'Value', 'Seq No', 'Import Message', 'Import Detail Status', 'Resubmit Flag', 'Record Type', 'Employer (ER) ETF ID', 'Billing Loc ID', 'Report Gen Type', 'Period Start Date', 'Period End Date', 'Pay Date', 'SSN', 'ITIN', 'Prefix', and 'First Name'. The 'Import Errors and Exceptions' window on the right shows a table of errors and exceptions with columns for 'Tools', 'Seq No', 'Num...', and 'Message'. It lists two errors: 'Report Gen Type is required' and 'Job Category is not found for the reported Billing Location'.

- 4) Click the *Summary* tab to review the errors and exceptions for all rows in the file.

The screenshot shows the 'Import Details' window with the 'Summary' tab selected. The window has a green header bar with 'Save' and 'Cancel' buttons. Below the header, there is a table with the following data:

File Name	Payroll File	File Load Date	12/15/2016
Import Description	Payroll File 11/20		
Import Status	Validated with Errors	Processing Status	Ready

Below this table, there are two tabs: 'Summary' (selected) and 'Details'. The 'Summary' tab contains the following sections:

- Indicative Information:**
  - Import Filename: MARY\_12\_15\_2016\_1481822007312\_Marathon County !
  - Status: Validated with Errors
- Statistics Information:**
  - Rows Loaded: 3
  - Rows Processed: 1
- Errors:** (This section is circled in red in the image)
  - Status: There are some errors and some exceptions.
  - Table with 4 columns: Tools, Seq No, Number, Message.
 

Tools	Seq No	Number	Message
	2	1	Total Earnings is required
	4	1	Total hours field is required
	6	1	Work Status is not a valid value

Below the 'Errors' section, there is a pagination bar showing 'Page 1 of 1' and navigation buttons. Below the pagination bar, there is a section for 'Exceptions' (circled in red in the image):

- Exceptions:**
  - Table with 4 columns: Tools, Seq No, Nu..., Message.
 

Tools	Seq No	Nu...	Message
	1	1	First Name is required
	3	1	Last Name and date of birth already exist in the system. Please confirm the SSN.

The **Seq No** indicates the row number that contains a problem.

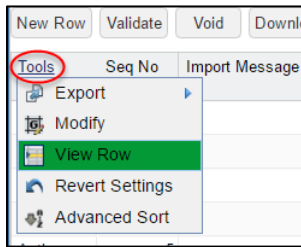
The **Number** column indicates how many problems are on the row.

- 5) Click the *Details* tab to correct the errors/exceptions.

**Note** You can filter the rows in the Details tab using the **Import Detail Status** drop-down list or the **Display Rows: From** and **To** fields.

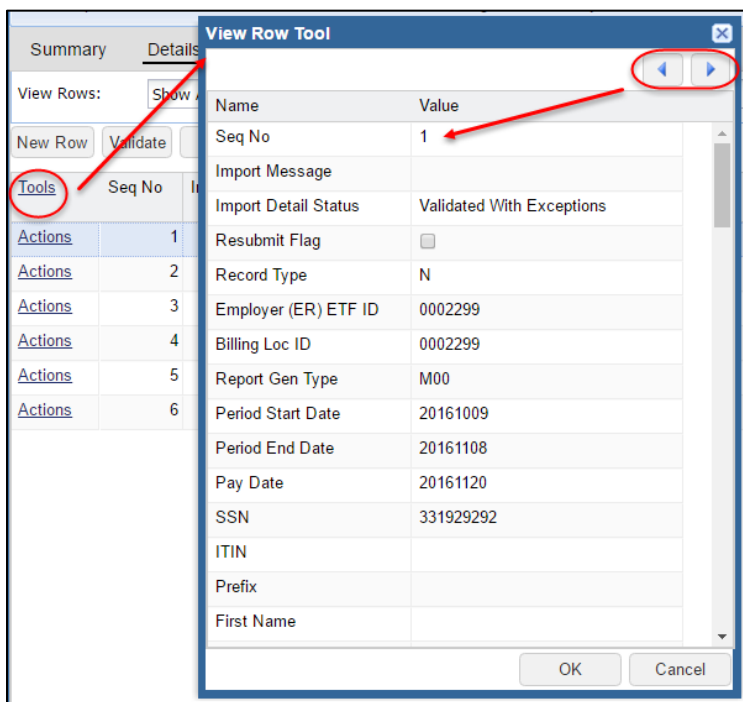
**Note** To use the **Display Rows: From** and **To** fields, enter the **Seq No** for the rows to review. For example, if there is an error to review on **Seq No** (row) 300, enter that number in both the **Display Rows: From** and **To** fields to have myETF display just that row in the grid.

- 6) Click the **Tools** link in the grid header.
- 7) Select **View Row** to see the records in a vertical format.



myETF opens the *View Row Tool* pop-up and displays the first record in the grid.

- 8) Use the **Arrow** buttons in the *View Row Tool* pop-up to move to Seq No for the record to correct.



- 9) Scroll down to the field that needs to be updated.
- 10) Type or select the correct value in the field.

**Note** Alternatively, use the horizontal and vertical scroll bars to move to the correct record and type the correct value in the appropriate field.

myETF automatically marks the **Resubmit** checkbox after you make a change to the row.

- 11) Continue updating the records for the errors/exceptions shown on the *Summary* tab.

**Note** All errors must be corrected before the file may be processed to create the work report.

- 12) Click **Save** after all updates are complete.

## Payroll File Validations

Access the [Payroll Resource File](#) document to review the Payroll File validations.

## Employment File Validations

Access the [Employment Resource File](#) document to review the Employment File validations.

## Revalidating an Uploaded File

After correcting all errors (and exceptions as needed) in the uploaded file, you must revalidate the file to ensure the file no longer contains any errors.

From the *Import Details > Details* tab:

- 1) Ensure you are in edit mode by clicking the **Edit** button.
- 2) Click **Validate**.

myETF revalidates the records where the **Resubmit Flag** is marked. myETF automatically marks these checkboxes after changes to the row are made.

**Import Details**

**Edit** **Close**

File Name	Payroll File	File Load Date	04/14/2017
Import Description	PR File 20000162		
Import Status	Validated with Errors	Processing Status	Validated

**Summary** **Details**

Import Detail Status: All Display Rows: From

**New Row** **Set All to Resubmit** **Set None to Resubmit** **Validate** **Void** **Download**

<a href="#">Tools</a>	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type
<a href="#">Actions</a>	1		Validated Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	2		Validated With Errors	<input checked="" type="checkbox"/>	N
<a href="#">Actions</a>	3		Validated Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	4		Validated Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	5		Validated With Errors	<input checked="" type="checkbox"/>	N



myETF displays the updated **Import Status**, **Processing Status**, and enables the **Process** button when the file is ready to be processed. If necessary, correct any additional records that contain errors and repeat the process.

For descriptions of the statuses, see [Uploaded File Status Definitions](#).

File Name	Payroll File	File Load Date	12/15/2016
Import Description	Payroll File 11/20		
Import Status	Validated with Exceptions	Processing Status	Validated

Summary		Details	
View Rows:	Show All Rows	Display Rows: From	
New Row	Validate	Process	Void
Download			

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type
<a href="#">Actions</a>	1		Validated Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	2		Validated Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	3		Validated With Exceptions	<input type="checkbox"/>	N
<a href="#">Actions</a>	4		Validated Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	5		Validated Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	6		Validated Successfully	<input type="checkbox"/>	N

- 3) Click **Save** after all errors are corrected and the **Import Status** is Validated Successfully or Validated with Exceptions. The **Processing Status** is Validated.

You are ready to process the file. (See [Processing an Uploaded File](#).)

**Note** You can validate the file from the *File History* window. Click the **Actions** link next to the file that needs validation. Select the **Validate** option.

File History						
Close						
File Definition:	Payroll File	Date Range:	10/17/2016	To:	12/16/2016	
Status:	All					
Tools	Import Header ID	Process Flag	Inserted Date	File Definition	Import Description	Status
<a href="#">Actions</a>	2730	Ready	12/15/2016	Payroll File	Payroll File 11/20	Validated with Errors
Validate	2729	Completed	12/15/2016	Payroll File	Payroll File 11/...	Voided
Details	2684	Completed	11/09/2016	Payroll File	Payroll File 11/...	Processed with Exceptions
Process	2682	Completed	11/09/2016	Payroll File	Payroll File 11/...	Voided
Void	2677	Completed	11/08/2016	Payroll File	11/09/2016 PR...	Voided
Download	2656	Ready	10/18/2016	Payroll File	Marathon coun...	Validated with Errors

## Processing an Uploaded File

After the Processing Status of the uploaded file is validated, you must process the file to either create the work report (for Payroll Files) or send the information to ETF (for Employment and Insurance Files).

From the *Import Details* > *Details* tab:

- 1) Click the **Process** button located above the grid.

File Name	Payroll File	File Load Date	12/15/2016
Import Description	Payroll File 11/20		
Import Status	Validated with Exceptions	Processing Status	Validated

[Summary](#)
[Details](#)

View Rows: Show All Rows
 Display Rows: From

[New Row](#)
[Validate](#)
[Process](#)
[Void](#)
[Download](#)

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type
<a href="#">Actions</a>	1		Validated Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	2		Validated Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	3		Validated With Exceptions	<input type="checkbox"/>	N
<a href="#">Actions</a>	4		Validated Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	5		Validated Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	6		Validated Successfully	<input type="checkbox"/>	N

myETF processes the records in the file and generates the work report from the uploaded Payroll File or if it is an uploaded Employment File, sends the records directly to ETF.

**Import Details**
[Edit](#)
[Close](#)

File Name	Payroll File	File Load Date	12/15/2016
Import Description	Payroll File 11/20		
Import Status	Processed with Exceptions	Processing Status	Completed

[Summary](#)
[Details](#)

View Rows: Show All Rows
 Display Rows: From

[New Row](#)
[Download](#)

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type
<a href="#">Actions</a>	1		Processed Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	2		Processed Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	3		Processed With Excepti...	<input type="checkbox"/>	N
<a href="#">Actions</a>	4		Processed Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	5		Processed Successfully	<input type="checkbox"/>	N
<a href="#">Actions</a>	6		Processed Successfully	<input type="checkbox"/>	N

- 2) Click **Close** to close the *Import Details* window.
- 3) Close the *File History* window (if open).

myETF displays the *Accounts* tab. You are ready to review the work report that myETF created after processing the file.

## Voiding an Uploaded File

When a file has numerous errors or numerous records containing errors, it may be more efficient to void the uploaded file, correct the errors in the file itself, and re-upload.

You can void a file that has not been “processed.”

There are two places where an uploaded file may be voided:

- ➔ From the *Import Details > Details* tab:
- ➔ From the *File History* tab.

**Note** You cannot undo voiding a file. When a file is voided it is no longer available for use. Re-load the file again if you void a file in error. After a file is processed, it may no longer be voided.

### Voiding a File from the File History Tab

- 1) Log in to myETF Employer Online Services as shown in [Logging In](#).
- 2) Locate the file as shown in [Locating an Uploaded File](#).
- 3) Click the **Actions** link next to appropriate file.
- 4) Select the **Void** option.  
A confirmation message displays.
- 5) Confirm the message.  
The file Status updates to Voided.

## Reviewing and Correcting a Work Report

After you create a work report manually or from uploading a Payroll File, it should be reviewed for errors and exceptions. All errors in the work report must be corrected before the file may be “submitted” to ETF.

- 1) Navigate to the *Accounts* tab for the employer.
- 2) Complete the following fields in the filter section:
  - ➔ **Billing Location:** Select the appropriate option from the drop-down list if needed.
  - ➔ **Trans Type:** Select **All Work Reports**
  - ➔ **Status:** Select **Open**
  - ➔ **Report Status:** Select **Initial**

The screenshot shows the 'Accounts' tab in the myETF system. The filter section includes:
 

- Billing Location Name: 20001137 EOB Local 01 BL 1
- Trans Type: All Work Reports
- Status: Open
- Report Status: Initial

 On the right, there are buttons for 'Upload File', 'File History', 'Manual Report', 'Payments', and 'Payment History'. Below the filters is a table with the following columns: Tools, Activity Date, Trans No, Trans Type, Trans Identifier, Trans Status, Report Status, Due Date, Addl EE, Addl ER, and Misc. The table contains five rows of work report data. Red circles highlight the filter fields and the 'Trans Type', 'Trans Status', and 'Report Status' columns in the table.

Tools	Activity Date	Trans No	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Addl EE	Addl ER	Misc
<a href="#">Actions</a>	03/21/2017	78989	Work Report	WR: Monthly, 12/25/2016 - 01/07/2017	Open	Initial		\$0.00	\$0.00	\$0.00
<a href="#">Actions</a>	01/15/2017	79016	Work Report	WR: Weekly, 01/15/2017 - 01/21/2017	Open	Initial		\$0.00	\$0.00	\$0.00
<a href="#">Actions</a>	03/27/2017	79017	Work Report	WR: Bi-Weekly, 01/01/2017 - 01/14/2017	Open	Initial	02/24/2017	\$0.00	\$0.00	\$0.00
<a href="#">Actions</a>	03/29/2017	79052	Work Report	WR: Bi-Weekly Sun-W1, 12/25/2016 - 01/07/2017	Open	Initial	02/24/2017	\$0.00	\$0.00	\$0.00
<a href="#">Actions</a>	03/20/2017	78956	Work Report	WR: Monthly, 01/01/2017 - 01/31/2017	Open	Initial	03/24/2017	\$0.00	\$0.00	\$0.00

myETF automatically updates the records in the grid to match the selections in the filter.

- 3) Click the **Trans #** column header twice to sort the records in descending order.

The most recent transaction has the highest **Trans #**. An inverted triangle icon indicates the sort order is descending.

Tools	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status
<a href="#">Actions</a>	12/16/2016	78320	Work Report	WR: Monthly, 10/09/2016 - 11/08/2016	Open	Initial
<a href="#">Actions</a>	12/13/2016	78319	Work Report	WR: Monthly, 09/09/2016 - 10/08/2016	Open	Initial
<a href="#">Actions</a>	09/09/2016	78281	Work Report	WR: Monthly, 09/09/2016 - 10/08/2016	Open	Initial
<a href="#">Actions</a>	02/09/2017	78280	Work Report	WR: Monthly, 02/09/2017 - 03/08/2017	Open	Initial
<a href="#">Actions</a>	01/09/2017	78251	Work Report	WR: Monthly, 01/09/2017 - 02/08/2017	Open	Initial
<a href="#">Actions</a>	12/09/2016	78250	Work Report	WR: Monthly, 12/09/2016 - 01/08/2017	Open	Initial

- 4) Click the **Actions** link next to the work report.
- 5) Select the **Work Report Editor** option to review.

Tools	Activity Date	Trans #
<a href="#">Actions</a>	12/16/2016	78320
Work Report Editor		78319
Submit		78281
Delete		78280

myETF opens the *Work Report Editor > Summary* tab. This window displays summary information about the Work Report, including sections for:

- ➔ High-level information
- ➔ **Financial Summary:** shows amounts by fund
- ➔ **Recon Summary:** shows general cause(s) of any existing issues

**Work Report Editor**

Save Apply Cancel

Employer: Marathon County Sheriff Report Type: Regular Report Period: 10/09/2016 - 11/08/2016 # of Participants: 6  
 Billing Location: 0002299 Marathon County Sheriff Report Status: Initial Identifier: WR: Monthly, 10/09/2016 - 11/08/2016 # of Rows: 6  
 Trans #: 78320

**Summary** Detail

Date Received: 12/16/2016 Created By: MARY on 12/16/2016 Pay Period Year: Date Released: mm/dd/yyyy  
 Due Date: 12/27/2016 User Released: Payroll Date: 11/20/2016 Reporting Agent:  
 Report Source: Employer

**Financial Summary**

Fund Name	Due Calculated	Amount Paid	Amount Owed
Sick Leave-Regular	\$0.00	\$0.00	\$0.00
Sick Leave-Regular-Unfunded Lia...	\$0.18	\$0.00	\$0.18
Employee Required - EE	\$0.00	\$0.00	\$0.00
Employee Required - ER	\$4.20	\$0.00	\$4.20
Sick Leave-Supplemental	\$0.00	\$0.00	\$0.00
Sick Leave-Supplemental Unfund...	\$0.18	\$0.00	\$0.18
Add EE	\$0.00	\$0.00	\$0.00
Add ER	\$0.00	\$0.00	\$0.00
BAC - ER	\$0.00	\$0.00	\$0.00
Sick Leave-Supplemental-Unfund...	\$0.00	\$0.00	\$0.00
	\$10.86	\$0.00	\$10.86

**Recon Summary**

Condition	Count
Invalid Date	3
Total Hours	6
Value is Missing	1

- 6) Click the *Detail* tab to review the records on the work report.
- 7) Click the *Exception Filter* drop-down list to filter the records shown in the grid.  
 The **Actions** column in the grid displays a red exclamation point when an error is on the record or a yellow triangle when there is only an exception.
- 8) Click the icon in the **Actions** column for the record to see a message describing the problem in the *Validations* pop-up.

**Validations**

Close

**Details**

Name: DOO, SCOOBY SSN: 331-92-9292 Work Status: WRS Eligible  
 Job Category: General Employment

**Warnings and Errors**

Tools	Display Name	Exception Reason	Validation Type
	Total Hours	Total Hours must equal the sum of Regular Hours, Overtime Hours, Compensatory Time Payout Hours, and Extra Cur Act Pay Hours. Please review and correct.	Error

**Reconciliation**

Reported	Calculated	Difference

- 9) Click **Close** in the *Validations* pop-up to close the message.

10) Make the corrections directly in the appropriate field on the record by either:

- ➔ Using the *Tools > View Row* option to view the records in a vertical format
- ➔ Scrolling to the field using the horizontal and vertical scroll bars.

The example shown in the screenshot below uses the *Tools > View Row* option to correct the record. Click **OK** after making corrections to all the records to close the *View Row Tool* pop-up.

The screenshot shows the 'View Row Tool' pop-up window. The window has a title bar with 'Trans #: 78320' and a close button. Below the title bar are tabs for 'Summary' and 'Detail'. The 'Detail' tab is selected. There is an 'Exception Filter' dropdown set to 'Please Select'. Below that are buttons for 'Add Member', 'Add New Member', and 'Delete Selected'. A 'Tools' menu is open, showing 'View Row' as the selected option. The 'View Row Tool' window displays a list of fields and their values. The 'Regular Hours' field is highlighted with a red box and contains the value 100.00. Other fields include 'Total Hours' (100.00), 'Overtime Hours', 'Compensatory Time Pa...', 'Extra Cur Act Pay Hours', 'EE Health' (\$0.00), 'EE Life' (\$0.00), 'Spouse/Dep Life' (\$0.00), 'EE ICI' (\$0.00), 'Anthem DentalBlue' (\$0.00), 'Epic Dental WI' (\$0.00), 'Vision' (\$0.00), and 'EPIC Benefits+' (\$0.00). At the bottom of the window are 'OK' and 'Cancel' buttons.

The example shown in the screenshot below shows correcting errors on the work report using the horizontal and vertical scroll bars.

Summary		Detail									
Exception Filter:		Please Select									
Add Member		Add New Member		Delete Selected							
Tools											
		id	EE Required Post-Tax	EE Addl	ER Addl	BAC Pre-Tax	BAC Post-Tax	Employee Site	Total Hours	Regular Hours	Overtime Hours
Actions	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		100.00	100.00	
Actions	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		100.00	100.00	
Actions	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		100.00	50.00	
Actions	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		10.00	50.00	
Actions	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		10.00	50.00	
Actions	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		10.00	50.00	

- 11) Add a record for an existing member (on your Roster) as needed by clicking the **Add Member** button and completing the information for the record. (See [Adding Employees to a Work Report.](#))

This option may be needed if an employee paid during the payroll period is inadvertently left off the work report or when manually creating a work report and the employee is not listed.

- 12) Add a record for a new member as needed by clicking the **Add New Member** button and completing the information for the record. (See [Adding Employees to a Work Report.](#))
- 13) Delete records from the work report by click the checkbox next to the **Actions** link for the record, then click the **Delete Selected** button. Multiple records can be deleted at one time.
- 14) Click **Apply** in the upper-left corner to save the report after making changes. (Clicking **Apply** saves the changes, but keeps the *Work Report Editor* open and in edit mode.)

myETF updates the report to clear any errors/exceptions corrected.

**Work Report Editor**

Save **Apply** Cancel

Employer: Marathon County Sheriff Report Type: Regular  
 Billing Location: 0002299 Marathon County Sheriff Report Status: Initial  
 Trans #: 78320

Summary Detail

Exception Filter: Please Select

Add Member Add New Member Delete Selected

Tools	<input type="checkbox"/> Actions	Record Type	Report Gen Type	Period Start Date	Period Stop Date
<a href="#">Actions</a>	<input type="checkbox"/>	N	Monthly	10/09/2016	11/08/2016
<a href="#">Actions</a>	<input type="checkbox"/>	N	Monthly	10/09/2016	11/08/2016
<a href="#">Actions</a>	<input type="checkbox"/>	N	Monthly	10/09/2016	11/08/2016
<a href="#">Actions</a>	<input type="checkbox"/>	N	Monthly	10/09/2016	11/08/2016
<a href="#">Actions</a>	<input type="checkbox"/>	N	Monthly	10/09/2016	11/08/2016
<a href="#">Actions</a>	<input type="checkbox"/>	N	Monthly	10/09/2016	11/08/2016

- 15) Correct any further errors on the report.
- 16) Click **Save** after correcting all errors and the *Work Report Editor* window closes.

myETF updates the report to clear any errors/exceptions corrected. When the work report no longer contains errors, it may be submitted to ETF. (See [Submitting a Completed Work Report to ETF.](#))



## Creating a Regular Work Report Manually

Work reports may be created manually by an employer using the **Manual Report** button on the *Accounts* tab.

- 1) Navigate to the *Accounts* tab for the employer
- 2) Change the **Billing Location Name** using the drop-down list as needed.
- 3) Click **Manual Report**
- 4) Select **Regular** from the options list.

The screenshot shows the 'Accounts' tab in the myETF interface. The 'Billing Location Name' is set to '20001137 EOB Local 01 BL 1'. The 'Trans Type' is 'All Work Reports', 'Status' is 'Open', and 'Report Status' is 'Initial'. On the right, there is a dropdown menu for 'Manual Report' which is highlighted with a red circle. Below it, the 'Regular Report' option is also highlighted with a red circle and an arrow pointing to it. Other buttons like 'Upload File', 'File History', 'Payment History', 'Show Funds', and 'Show Fund Groups' are also visible.

myETF displays the *Generate Work Report* pop-up.

- 5) Select the checkbox next to the appropriate **Report Generation Type** to generate the next payroll report for the dates shown on the record.

**Note** No checkboxes appear when there is only one reporting cycle for the billing location.

**Note** If not creating the work report through the file upload process, you must manually create separate work reports for each payroll cycle shown in the *GenerateWorkReport* pop-up.

- 6) Click **Generate**.

The screenshot shows the 'GenerateWorkReport' pop-up window. At the top, it displays the 'Employer: 0002299-Marathon County Sheriff' and 'Billing Location: 0002299 Marathon County Sheriff'. Below this is a table with columns: 'Report Generation Type', 'Last Report Date', 'Report Start Date', 'Report Stop Date', and 'Message'. The table contains two rows: 'Weekly' and 'Monthly'. The 'Monthly' row has a checkbox selected, indicated by a red circle and an arrow. At the bottom of the window, there is a 'Generate' button, also highlighted with a red circle, and a 'Close' button.

Report Generation Type	Last Report Date	Report Start Date	Report Stop Date	Message
<input type="checkbox"/> Weekly	12/23/2016	12/30/2016	01/05/2017	
<input checked="" type="checkbox"/> Monthly	11/09/2016	12/09/2016	01/08/2017	

myETF generates the work report for the period and displays the *Work Report Editor > Summary* tab. Preliminary information displays for the work report based on the any prior work report submitted and roster information.

**Work Report Editor**

Save Apply Cancel

Employer: Marathon County Sheriff Report Type: Regular Report Period: 03/09/2017 - 04/08/2017 # of Participants: 1  
 Billing Location: 0002299 Marathon County Sheriff Report Status: Initial Identifier: WR: Monthly, 03/09/2017 - 04/08/2017 # of Rows: 1  
 Trans #: 78321

**Summary** Detail

Date Received: mm/dd/yyyy Created By: MARY on 12/16/2016 Pay Period Year:   
 Due Date: 09/26/2016 User Released: Payroll Date: mm/dd/yyyy  
 Report Source:

**Financial Summary**

Fund Name	Due Calculated	Amount Paid	Amount Owed
Health	\$0.00	\$0.00	\$0.00
Employer Required	\$4,750.00	\$0.00	\$4,750.00
Duty Disability	\$0.00	\$0.00	\$0.00
Prior Service Monthly	\$500.00	\$0.00	\$500.00
Sick Leave-Regular	\$0.00	\$0.00	\$0.00
Sick Leave-Regular-Unfunded Lia...	\$150.00	\$0.00	\$150.00
Employee Required - EE	\$0.00	\$0.00	\$0.00
Employee Required - ER	\$3,500.00	\$0.00	\$3,500.00
Sick Leave-Supplemental	\$0.00	\$0.00	\$0.00
Sick Leave-Supplemental Unfunded	\$150.00	\$0.00	\$150.00
	\$10,050.00	\$0.00	\$10,050.00

7) Select **Employer** from the **Report Source** drop-down list.

**Note** Do not select Conversion from the drop-down list.

8) Click **Apply** to save the information for the report and remain in edit mode.

9) Click the *Detail* tab.

**Note** Use the [Payroll File Resource Document](#) to complete the fields on the generated work report.

**Note** The manual payroll report populates (by default) based on the members shown in your Roster for the reporting cycle. When no members display on the generated work report, you need to add the members using the information shown [Adding Employees to a Work Report](#).

10) The *Detail* tab displays the active employees for the billing location and reporting cycle.

**Work Report Editor**

Save Apply Cancel

Employer: Marathon County Sheriff Report Type: Regular Report Period: 12/09/2016 - 01/08/2017  
 Billing Location: 0002299 Marathon County Sheriff Report Status: Initial Identifier: WR: Monthly, 12/09/2016 - 01/08/...  
 Trans #: 78904

Summary **Detail**

Exception Filter: Please Select

Add Member Add New Member Delete Selected

Tools	Actions	Record Type	Report Gen Type	Period Start Date	Period End Date	Pay Date	Rate Date	SSN	Name
Actions				12/09/2016	01/08/2017			335-87-3452	Adesman, Brian
Actions				12/09/2016	01/08/2017			100-10-1001	BEAR, YOGI
Actions				12/09/2016	01/08/2017			293-92-4020	Blake, Daphne

11) Update the records for the payroll period for each employee listed on the report using the information provided in the myETF [Payroll File Resource Document](#).

12) Add existing employees to the work report using the **Add Member** button. (See [Adding Employees to a Work Report](#).)

13) Add any new employees to the work report using the **Add New Member** button. (See [Adding Employees to a Work Report](#).)

14) Terminate any employee that was terminated during the payroll period. (See [Terminating Employees on a Work Report](#).)

15) Click **Apply** to see the validations needed for the work report.

16) Review and correct the report for errors or exceptions as indicated by the red icon in the Actions column.

17) Click **Save** when all is complete and to close the Work Report Editor page.

## Adding Employees to a Work Report

New and existing employees that do not appear on the work report may be added using the Add Member and Add New Member buttons located on the *Work Report Editor > Details* tab.

See the following sections for instructions:

- [Adding Existing Employees](#)
- [Adding New Employees](#)

### Adding Existing Employees

At times, you may need to add an existing active employee from your billing location's roster (see [Using the Roster Tab](#)) to a work report. This may happen when an employee is only paid occasionally, such as a director or temporary/seasonal employee. (See bullets under step 10 in [Creating a Regular Work Report Manually](#) for additional information.)

From the *Work Report Editor > Details* tab (see [Searching for Account Transactions](#)).

- 1) Click the **Add Member** button to add a new row to the work report.

- 2) Tab to the **Name** field and enter the member's last name, first name.  
myETF populates the **SSN** field based on the information in the employer roster.
- 3) Complete the information for the employee for the payroll period as required in the [Payroll File Resource Document](#).
- 4) Click **Apply** to save the record and continue updating the work report.
- 5) Click **Save** after the work report is complete.

## Adding New Employees

When a new employee is hired and paid during the payroll period and does not appear on the work report for that period, the record for their employment may be added manually to the work report. This creates a new employee record in myETF and adds the member to the Billing Location Roster.

From the *Work Report Editor* > *Detail* tab (see [Searching for Account Transactions](#)).

- 1) Click the **Add New Member** button.

The screenshot shows the 'Work Report Editor' window. At the top, there are 'Save', 'Apply', and 'Cancel' buttons. Below them, a summary section displays: Employer: Marathon County Sheriff, Report Type: Regular, Billing Location: 0002299 Marathon County Sheriff, Report Status: Initial, and Trans #: 78904. The 'Detail' tab is selected. Under 'Exception Filter', there is a dropdown menu set to 'Please Select'. Below this, three buttons are visible: 'Add Member', 'Add New Member' (which is circled in red), and 'Delete Selected'. At the bottom, there is a table with columns: Tools, Actions, Record Type, Report Gen Type, Period Start Date, and Period End Date. The first row shows '12/09/2016' and '01/08/2017'.

- 2) The *Add Member* wizard opens.

The screenshot shows the 'Add Member' wizard with four steps: 1 Search, 2 Verification, 3 Person Demographics, and 4 Confirm. The 'Search' step is active. It contains the following fields: First Name (text input), Last Name (text input), SSN Indicator (dropdown menu set to 'SSN'), SSN (text input), and Date of Birth (text input with a date picker icon). At the bottom, there are 'Cancel' and 'Search' buttons.

- 3) Complete the *Add Member* wizard as described in [Adding a New Hire](#).

- 4) Complete the payroll information on the new row created on the work report by the *Add Member* wizard for the payroll period as required.
- 5) Click **Apply** to save the record and continue updating the work report.
- 6) Click **Save** after the work report is complete.

## Terminating Employees on a Work Report

You can terminate an employee directly on the work report for the period.

From the *Work Report Editor > Detail* tab (see [Searching for Account Transactions](#)).

- 1) Locate the payroll record for the terminated employee in the work report by sorting on the SSN (ascending or descending as needed).

The screenshot shows the 'Work Report Editor' interface. At the top, there are buttons for 'Save', 'Apply', and 'Cancel'. Below this, a summary bar displays: Employer: Marathon County Sheriff, Report Type: Regular, Report Period: 12/09/2016 - 01/08/2017, Billing Location: 0002299 Marathon County Sheriff, Report Status: Initial, Identifier: WR: Monthly, 12/09/2016 - 01/08/2017, and Trans #: 78904. The 'Detail' tab is selected. Below the tab, there is an 'Exception Filter' dropdown set to 'Please Select' and buttons for 'Add Member', 'Add New Member', and 'Delete Selected'. A table with columns: Tools, Actions, Record Type, Report Gen Type, Period Start Date, Period End Date, Pay Date, Rate Date, SSN, and Name. The 'SSN' column header is circled in red. The table contains two rows of data:

Tools	Actions	Record Type	Report Gen Type	Period Start Date	Period End Date	Pay Date	Rate Date	SSN	Name
<a href="#">Actions</a>	<input type="checkbox"/>			12/09/2016	01/08/2017			100-10-1001	BEAR, YOGI
<a href="#">Actions</a>	<input type="checkbox"/>			12/09/2016	01/08/2017			125-45-8745	CHAIREZ, AIS..

To sort, click the **SSN** header or the drop-down link next to the header to select ascending or descending.

- 2) Enter the termination information for the employee:
  - **Empl Status Change**: Select the reason for the termination from the drop-down list.
  - **Empl Status Change Start Date**: Enter the date following the last date of employment.
  - **Prev Empl Status Stop Date**: Enter the last date of employment.
  - **Empl Status Change Last Pay Date**: Enter the last date for which the employee is entitled to receive pay (not the last pay check date).
- 3) Update the remaining fields for the record as needed for the last payroll.
- 4) Click **Apply** to save the change to the work report.
- 5) Click **Save** after all work report changes are complete.

## Deleting an Employee from a Work Report

From the *Work Report Editor* > *Detail* tab (see [Searching for Account Transactions](#)).

- 1) Locate the payroll record for the employee to remove from the work report by sorting on the SSN (see [Terminating Employees on a Work Report](#)).

**Work Report Editor**

Save Apply Cancel

Employer: Marathon County Sheriff Report Type: Regular Report Period: 12/09/2016 - 01/08/2017  
 Billing Location: 0002299 Marathon County Sheriff Report Status: Initial Identifier: WR: Monthly, 12/09/2016 - 01/08/2017  
 Trans #: 78904

Summary **Detail**

Exception Filter: Please Select

Add Member Add New Member Delete Selected

Tools	Actions	Record Type	Report Gen Type	Period Start Date	Period End Date	Pay Date	Rate Date	SSN	Name
Actions	<input type="checkbox"/>			12/09/2016	01/08/2017			100-10-1001	BEAR, YOGI
Actions	<input type="checkbox"/>			12/09/2016	01/08/2017			125-45-8745	CHAIREZ, AIS.

- 2) Click the checkbox next to the **Actions** link for the employee.
- 3) Click **Delete Selected**.
- 4) Click **Yes** in the confirmation message.  
myETF removes the row from the work report.
- 5) Click **Apply** to save your changes.
- 6) Click **Save** after all work report changes are complete.



## Submitting a Completed Work Report to ETF

After a work report is updated to correct all errors (and exceptions as needed), it is ready to submit the report to ETF. Submitting a work report is your acknowledgement that the work report is complete and correct to the best of your knowledge and the amount due is payable to ETF.

- 1) Navigate to the *Accounts* tab for the employer.
- 2) Complete the following fields in the filter section:
  - ➔ **Billing Location Name** select the appropriate option from the drop-down list if needed.
  - ➔ **Trans Type**: Select **All Work Reports**
  - ➔ **Status**: Select **Open**
  - ➔ **Report Status**: Select **Initial**

Tools	Activity Date	Trans No	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Addl EE	Addl ER	Misc
<a href="#">Actions</a>	03/21/2017	78989	Work Report	WR: Monthly, 12/25/2016 - 01/07/2017	Open	Initial		\$0.00	\$0.00	
<a href="#">Actions</a>	01/15/2017	79016	Work Report	WR: Weekly, 01/15/2017 - 01/21/2017	Open	Initial		\$0.00	\$0.00	
<a href="#">Actions</a>	03/27/2017	79017	Work Report	WR: Bi-Weekly, 01/01/2017 - 01/14/2017	Open	Initial	02/24/2017	\$0.00	\$0.00	
<a href="#">Actions</a>	03/29/2017	79052	Work Report	WR: Bi-Weekly Sun-W1, 12/25/2016 - 01/07/2017	Open	Initial	02/24/2017	\$0.00	\$0.00	
<a href="#">Actions</a>	03/20/2017	78956	Work Report	WR: Monthly, 01/01/2017 - 01/31/2017	Open	Initial	03/24/2017	\$0.00	\$0.00	

myETF automatically updates the records in the grid to match the selections in the filter.

- 3) Click the **Actions** link next to the appropriate work report.
- 4) Select **Submit**.

Tools	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status
<a href="#">Actions</a>	12/16/2016	78320	Work Report	WR: Monthly, 10/09/2016 - 11/08/2016	Open	Initial
Work Report Editor		78319	Work Report	WR: Monthly, 09/09/2016 - 10/08/2016	Open	Initial
Submit		78281	Work Report	WR: Monthly, 09/09/2016 - 10/08/2016	Open	Initial
Delete		78280	Work Report	WR: Monthly, 02/09/2017 - 03/08/2017	Open	Initial

myETF sends the report to ETF. The **Status** of the work reports changes to **Pending** while it is being submitted. The **Status** of the work report changes to **Posted** when it is received at ETF.

**Note** After the report is submitted to ETF, it may no longer be edited. You may review the information on the report, but no changes can be made.

**Note** Only work reports that have a **Status** of **Initial** may be updated.

## Using the FAQ Tab

Use the *FAQ* tab to review the answers to frequently asked questions. For myETF Employer Reporting Confirmation, the FAQ tab will list general information about the WRS. Please see the myETF Employer Web Pages for important Frequently Asked Questions about Confirmation.

## Glossary of Terms

The following table describes terminology used in myETF for employers.

Term	Definition
■ Billing Location	A location for which payroll is processed for a group of employees at an employer. Most employers have a single billing location.
■ Employer	An agency or department for the state of Wisconsin whose employees are members of the Employee Trust Funds
■ File Import Process	<p>The process of taking a CSV or XML file containing payroll or employment data and inserting it into myETF. The File Import Process consists of multiple steps:</p> <ul style="list-style-type: none"> <li>■ Upload</li> <li>■ Validate</li> <li>■ Review exceptions and correct errors found during validation.</li> <li>■ Revalidate (if applicable)</li> <li>■ Process</li> </ul> <p>After processing the file, records in the file either create a work report (Payroll File) or update the roster (Employment File).</p>
■ Member Contract	A record for the employment information about the employee's employment at your billing location. Employees may have multiple member contracts at your billing location if they are hired to work in multiple job categories simultaneously.
■ Process	System evaluation (validation) and push of data to create a work report (from a Payroll File) or populate the roster (from an Employment File). Only rows that process without errors are pushed to the work report or roster. This is the third step of the file import process
■ Report Source	The source from which information is added to the system (e.g., employer, member, etc.)
■ Reporting Cycle	A set pay cycle in which an employer pays employees (e.g., monthly, bi-weekly, weekly, etc.). Employers may have multiple reporting cycles. This is referred to as the Report Generation Type in the Payroll File Resource document.

Term	Definition
■ Roster	A list of employees at an employer billing location. By default this list displays only the “active” employees. You can see all employers by deselecting the Show Active Only checkbox on the <i>Roster</i> tab.
■ Submit	The action of confirming that updates to the work report are complete and no farther action on the part of the employer will occur on this work report. Submission also indicates that the employer agrees with the amount due on the work report.
■ Transactions	An activity that creates a debit and/or credit accounting transaction (e.g., work report, payment, adjustment, interest, etc.). Transactions are listed for an employer by billing location on the <i>Accounts</i> tab.
■ Upload	First step of the file import process; is the act of providing the CSV or XML file with the raw Payroll File data or Employment File data.
■ Validate	System evaluation of each row on the Payroll File or Employment File import to confirm it meets the criteria of the validations without errors or exceptions. For a Payroll File, the validations are for data requirements only. For an Employment File the validations include both data and business rules.
■ Wizard	A group of screens that walk through a process in a page by page format in myETF (e.g., Add Member wizard, Upload File wizard, Enrollment wizard, etc.)
■ Work Report	A report created through the import of a Payroll File or through a manual process that includes the set of data containing wages, contributions, hours, balances due, and other member data reported by an employer to ETF. This includes all active employees paid during the report cycle defined for the work report. There are two types of work reports: Normal and Adjustment.

## Uploading a File Through the SFTP Site

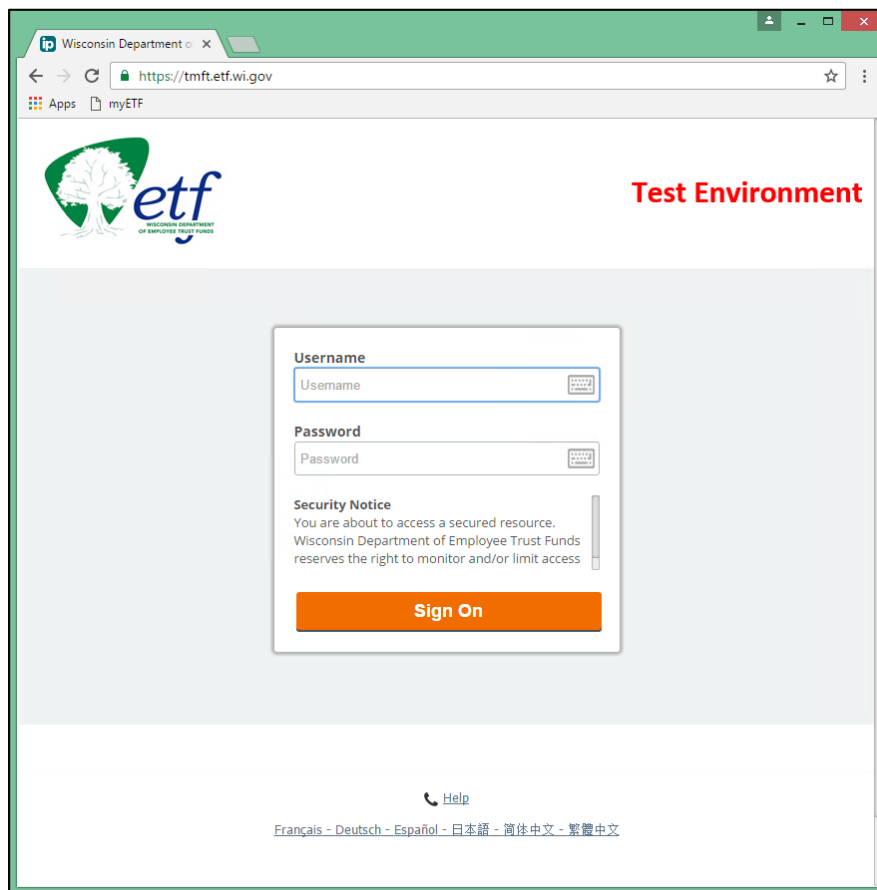
### Summary

ETF provides a secure, simple to use Managed File Transfer (MFT) solution for exchanging files. This service can be used for both sending files to and receiving files from ETF. The following demonstrates how to send data to ETF for myETF Employer Reporting Confirmation using the Test MFT environment. Files can be submitted by using either a web browser or an SFTP client.

### Accessing the SFTP Site Using Your Web Browser

- 1) Open your web browser and navigate to <https://tmft.etf.wi.gov>.
- 2) Log on using your IAM username and password.

**Note** Note the red banner indicating that this is the Test Environment. A separate URL will be provided for the production environment when available.



After logging in, you see your *Home* folder. Your *Home* folder is not shared and is only accessible by you. Please note that you will **not** use this folder to send or receive myETF related files. Instead, you will upload your files to the **Home/Employers/Upload** folder.

**Note** The Upload folder has a strict filename policy and will not allow you to upload any files that do not match the requirement shown below. Only files named according to the ETF file upload naming conventions are accepted through the SFTP site or can be uploaded to the folder:

**SFTP Payroll and Employment Upload Folder File Naming Conventions:**

Payroll File Naming Convention:

ETF\_Payroll\_[EmpETF\_ID].csv  
ETF\_Payroll\_[EmpETF\_ID].xml

Employment File Naming Convention:

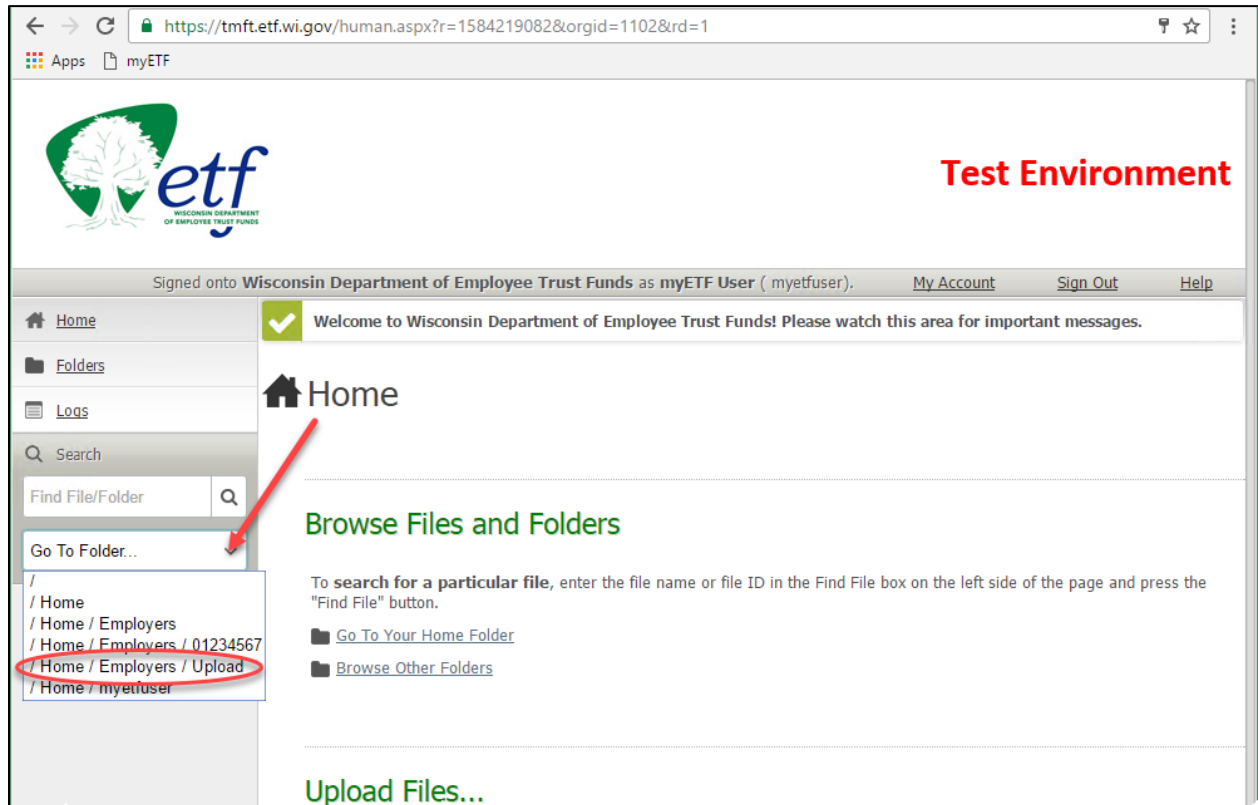
ETF\_Employment\_[EmpETF\_ID].csv  
ETF\_Employment\_[EmpETF\_ID].xml

The filenames are not case sensitive. Substitute your employer ETF ID for [EmpETF\_ID]. In most cases, this is the seven-digit Employer Identification Number (EIN) that you currently use. If you do not know your employer ETF ID, please contact ETF's Employer Communication Center at 1-877-533-5020.

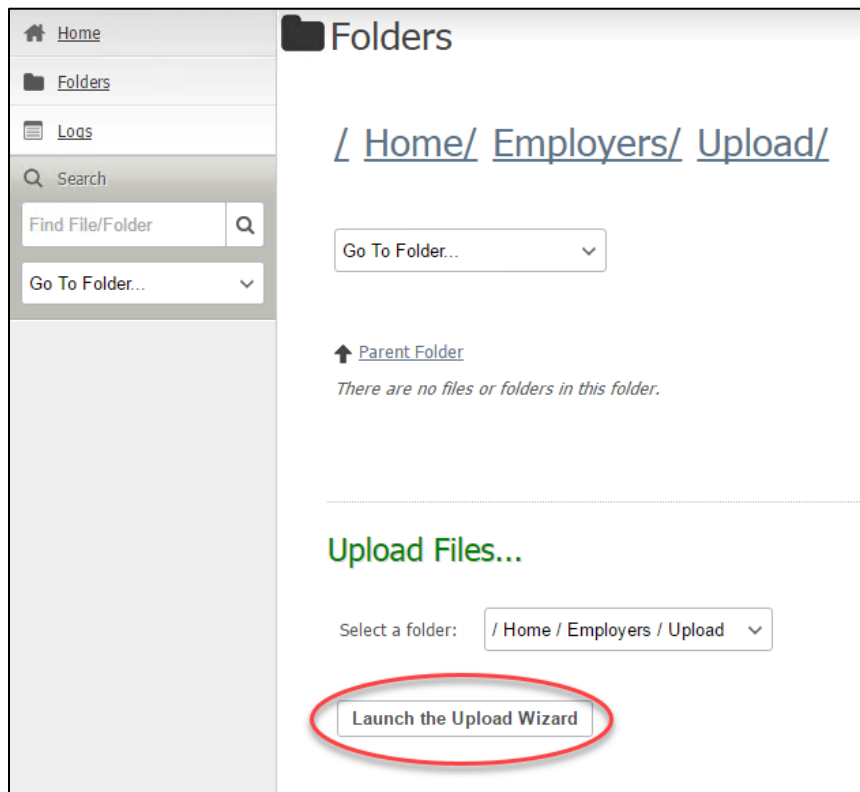
Although the Upload folder is a shared folder, you will not have access to other employers' files. ETF will monitor the folder and collect your files on a regular basis.

## Uploading a File Using the SFTP Site

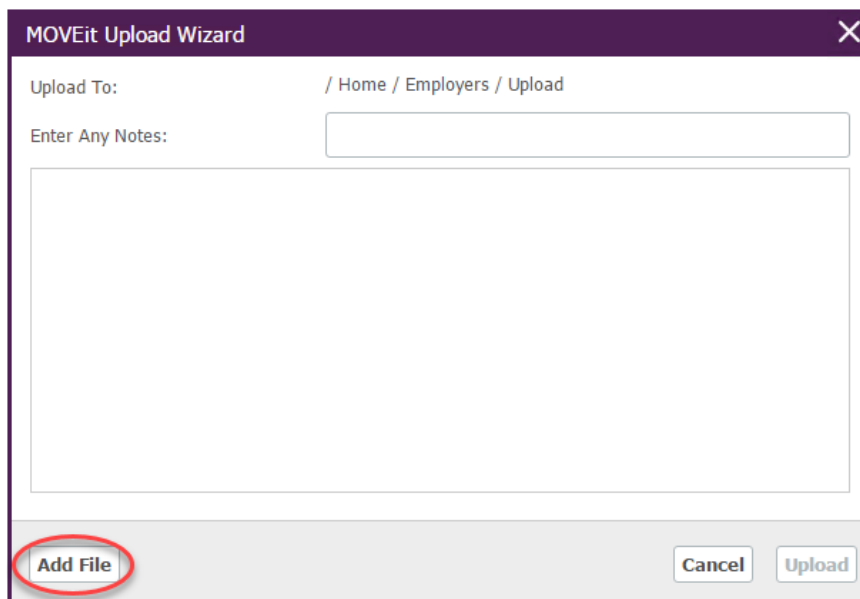
- 1) Log into the SFTP site as shown in [Accessing the SFTP Site Using Your Web Browser](#).
- 2) Click the **Go To Folder...** drop down list.
- 3) Select the **Home/Employers/Upload** folder.



- 4) Click the **Launch the Upload Wizard** button.

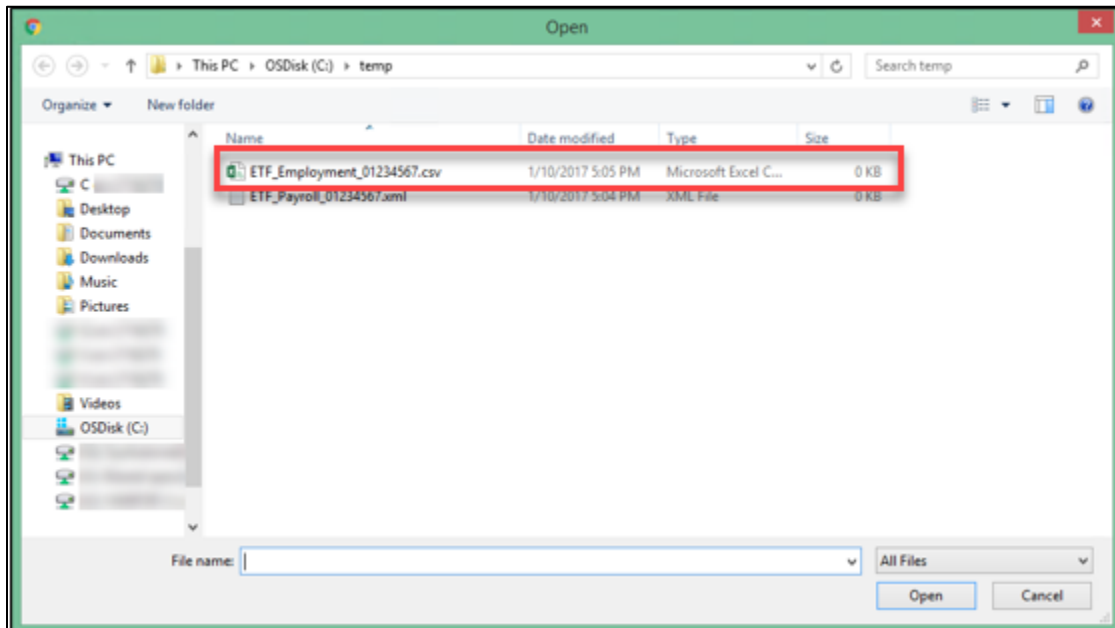


- 5) Click the **Add File** button to browse for the file to be uploaded.

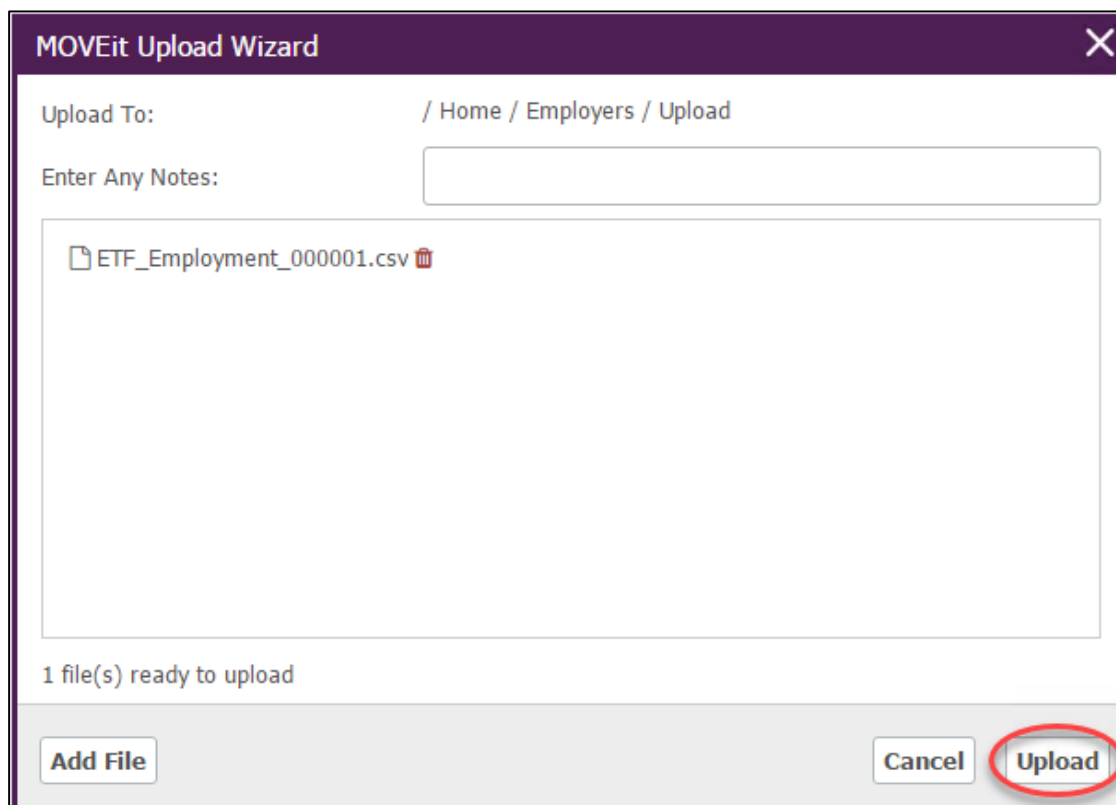




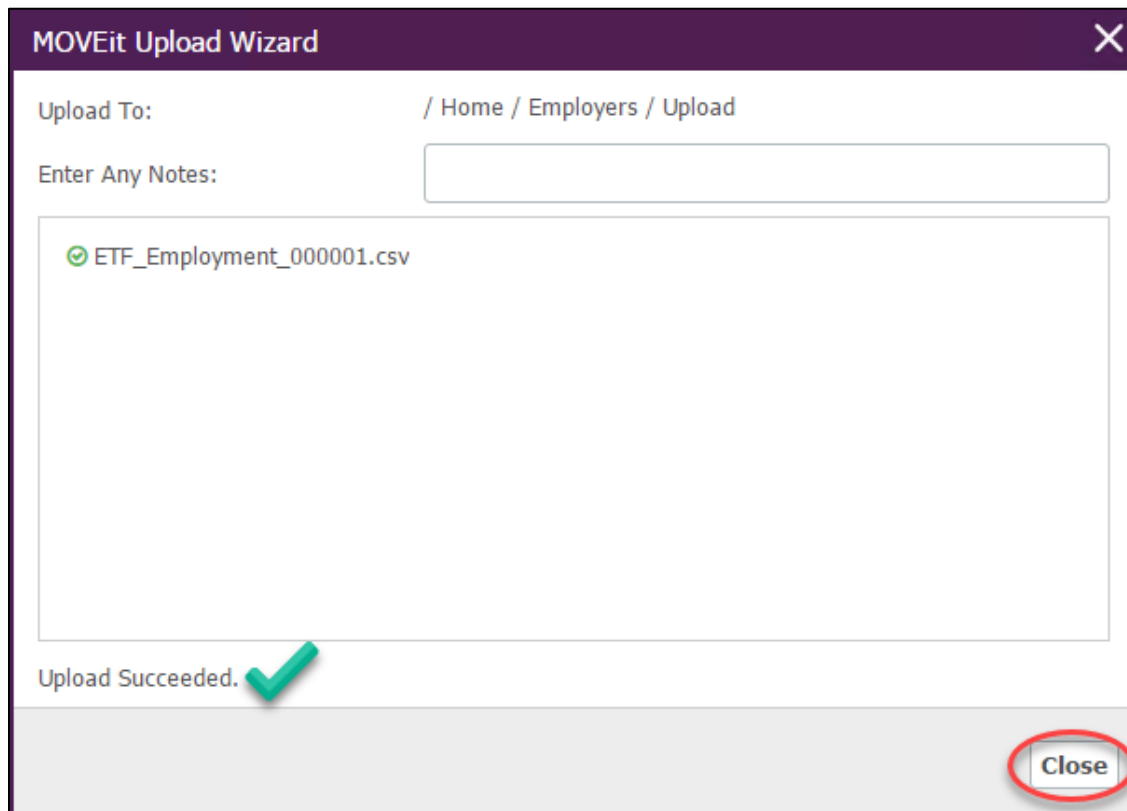
6) Select the file to be uploaded.



7) Click **Upload**.

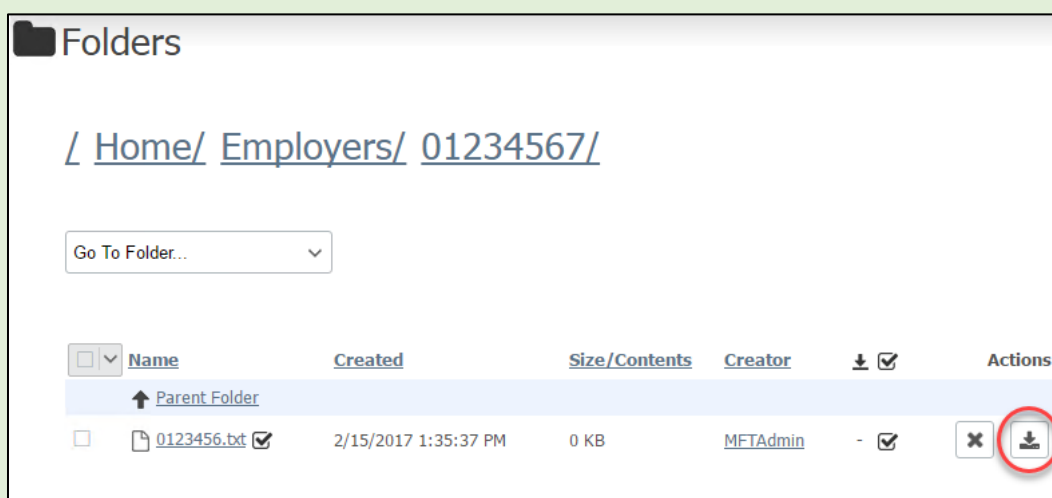


- 8) Click the **Close** button to complete the upload and return to the folder.



- 9) Refer to [Locating an Uploaded File](#) for next steps regarding the processing of your file.

**Note** If there is a problem with your file, ETF will send an email alert and generate a response file. To retrieve your response file, simply navigate to your employer ETF ID folder located under the Employers folder. Then, click the **Download** link for the file.



## Setting up the SFTP Client

Virtually any client that supports SFTP can be configured to connect to ETF's MFT environment. Simply configure your preferred client with the settings noted below. Although ETF does not recommend or support any specific clients, we have found that both the WS\_FTP Professional and FileZilla clients work with the service.

Please use the same folder noted in the section above for uploading files to ETF.

- ETF Test Server: [tmft.etf.wi.gov](https://tmft.etf.wi.gov)
- Authentication Method: Password